

Libria Administrator Manual

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Introduction



FOIA Overload? One Simple Solution.

Getting the right information to the right people within the right time frame is a challenge. Libria can simplify the time-consuming method of manually processing FOIA requests so your staff can get back to work.



Customize

Tailor Libria to meet your FOIA needs with pre-designed templates that can be fine-tuned to your organization.



Report

Built-in dashboard view, adhoc and standard reports at your fingertips.



Manage

Easily locate, retrieve, redact and archive the appropriate response documents.



Comply

Automated deadlines and alerts ensure you don't miss a due date.



Optimize

Improve your FOIA workflow by automating intake, simplifying processing, and accelerating responses.



Use

Hit the ground running. Libria's easy to use interface requires little training.

MSF&W has set out to create a web-based management system that would allow agencies to electronically manage FOIA documents. The application also will allow members of the public to track FOIA requests via agency websites.

Libria will help streamline the requests, so employees are not standing at photocopiers for hours and hours. They can do electronic lookups and electronic documents, so they're not stuck in the file room, even if they are a paper-heavy environment.

Libria Features

- Secure Redaction: By burning redactions onto the image, your information is safe
- Granular security controls to manage user permissions and access
- Document import & scanning: Combine electronic files and paper documents into one response packet
- Audit Log: easily view an audit trail of all user actions
- Customizable workflow: Model workflow steps specific to your organization through an easy-to-use interface

- Dashboard view: easily view request status, outstanding volume, and approaching due dates
- Reporting: run standard or ad-hoc reports to show FOIA requests by status, date range, user, etc.
- Web requests: submitted requests are automatically captured and routed to workflow for processing
- Online Tracking: Tracking number automatically assigned for status checking by requester
- Online Publishing: Publish responses online to be downloaded by requester
- Search and retrieve: Easily gather relevant documents from emails, documents repositories, or network directories
- Hosted or installed: Online, "cloud" based solution or installed on your server
- Correspondence Manager: Customizable templates make sending response letters simple
- Custom integration: Optional integration with your document management system
- Alerts: Automated deadline creation, tracking, and alerts
- Accessible: Complies with accessibility standards for people with disabilities including Section 508, WCAG 2, and IITAA

For more information or a demo, call 877-698-3535

MSF&W

Public User

For information on Public User's adding new requests and searching on submitted request, see Libria User Manual.

Organization User

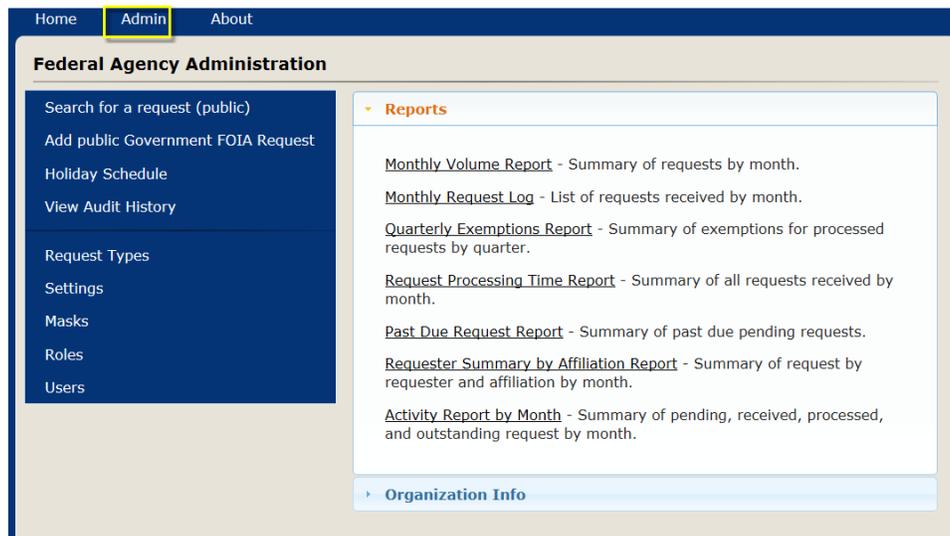
For information on Organization Users logging in, resetting passwords and fulfilling a request, see Libria User Manual.

Organization Administration

When Libria is installed on the server, it will include a default organization. This default Organization may be modified to meet the business needs of your organization. Users whose login id belongs to the OrgAdmin role, will be able to make the necessary modifications.

Admin Home

OrgAdmin users can access administration screens by using the Admin link on the menu bar. From this window a user can add or modify Request Types, Settings, Masks, Roles, Users, run Reports, add or retrieve Requests and make changes to the Organization Info.



Search for a request (public)

In order for a public user to find out the status of their request, they can enter the Tracking Number and the Requester's email or a keyword of the requested information.

Tracking Number - The number assigned to the request. This number was displayed on the confirmation window when the request was submitted and may also have been sent in a confirmation email. Entering only the Tracking Number will return a single result.

Requester's Email - Enter requester's email as it was entered in the Email field when the request was created.

Keywords - Text entered in the Keywords searches text that was entered in the Information Requested field when the request was submitted.

Tracking #	Requester	Affiliation	Status
1003		Fox News	In Progress
1004		Yahoo	In Progress

- Enter text in the Keywords **OR** the Tracking Number **AND** the Requester's Email.
- Entering a Keyword search limits the amount of information returned.
- Searching on the Tracking Number and the Requester's Email will return the final document, if request is completed, and any correspondence in the Document Downloads box and also any attachments that had been submitted with the request.
- Click on the Search button.
- For each request found, the request's information and status will return.
- The Status will be **In progress** or **Complete**.
- The Information Requested text appears when the mouse hovers above the Tracking # for each request.
- The list may be narrowed by entering additional text in the Filter box. This may be the Tracking #, Requester, Affiliation, Status or Information Requested columns. The Information Requested column is a hidden column but can be viewed by using the mouse to hover over the Tracking #.
- Click on the Tracking # to open the request. If the documents were published to the public site, they will be listed in Document Downloads for the requester to retrieve.
- If the request is not found, verify that the Tracking Number and Requester's Name was entered exactly as it was given on the confirmation window or in the confirmation email.

Add public * Request

See Adding Public Request for details in the Libria User Manual.

Holiday Schedule

Holiday Dates are taken into account when the number of days are calculated for a Request's Due Date.

Add:

To add a Holiday, click on the Holiday Schedule link located to the left of the Home window.

1. Click on the Add button.
2. Enter the holiday in the Name field.
3. Select the holiday's date in the Holiday Date field.
4. Click on the Save button.

Edit:

To edit a Holiday, click on the **Holiday Schedule** link located to the left of the **Home** window.

1. Click on the Edit  icon of the holiday's name.
2. Make the changes.
3. Click on the Save button.

Delete:

To delete a Holiday, click on the Holiday Schedule link located to the left of the Home window.

1. Click on the Delete  icon of the holiday's name.
2. A verification window will open.
3. Click on the Delete button.

View Audit History

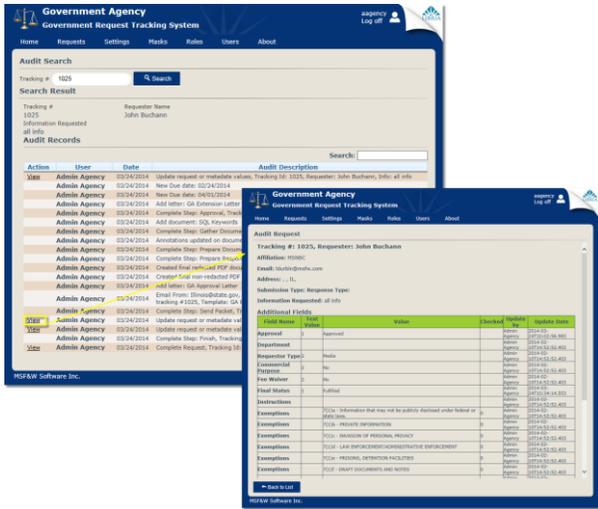
A user logging in as an administrator can view audit history records of a single request.

1. Entering in the Tracking #.
2. Click the Search button.



Action	User	Date	Audit Description
No data available in table			

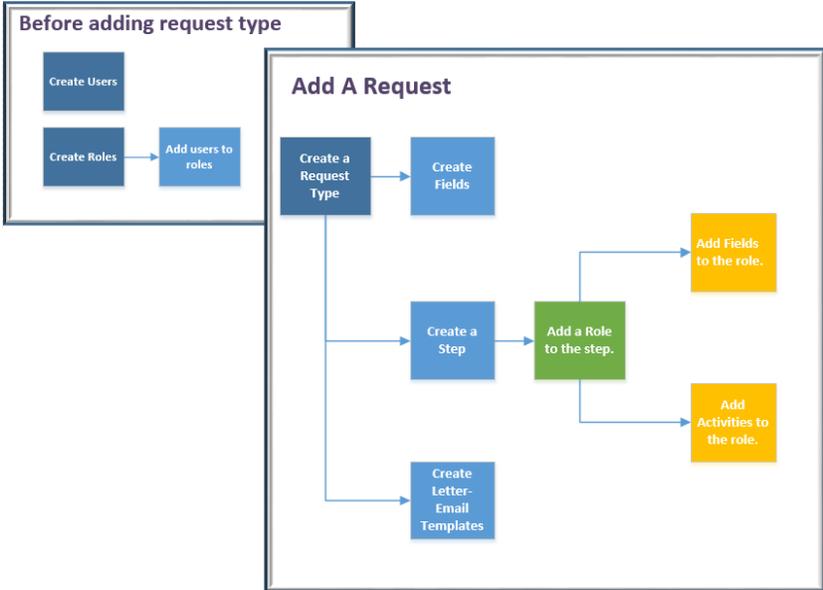
The Audit Search Results displays audit information for when a request has been created, completed, deleted, Due Date change, step completion, adding documents, deleting documents or letters, adding letters, sending emails and changing or adding field data. Some of the audit records are shown in the image below.



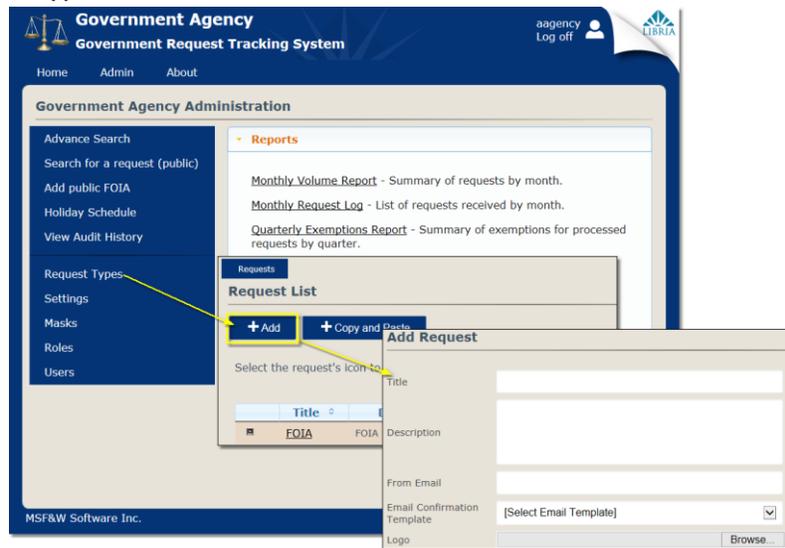
- 3. Click on the View link in the Action column.
- 4. A list of fields and their data values are displayed.
- 5. The Update Date column will show when the value on the field was last set.
- 6. Click Back to List to return to the Audit Search window.

Request Types

Below is a diagram displaying the parts needed to create a new Request Type. If any changes need to be made to a Request Type already in place, this chart should also help in locating where the modification needs to be made. When Libria is installed on the server, it will have a default Request Type already configured. The default Request Type may be modified to meet the needs of your organization.



Add a new Request Type



Create new:

1. Click on Request Type located on the menu bar.
2. Click on the Add button.
3. Title: Enter the name of the new request type in the Title.
4. Description: Add a description if needed. The description is shown on the Request List administration page.
5. From Email: Enter the reply email account. When a requester receives an email such as a confirmation, the requester can send a reply email to this account.
6. Email Confirmation Template: Select the Email Confirmation Template that will be sent out on a Public Request upon the submission of a request.
7. To upload the organization's logo, click on Browse button.
8. A Choose File to Upload dialog will open.
9. Locate the file and click the Open button.
10. Click on the Save button.

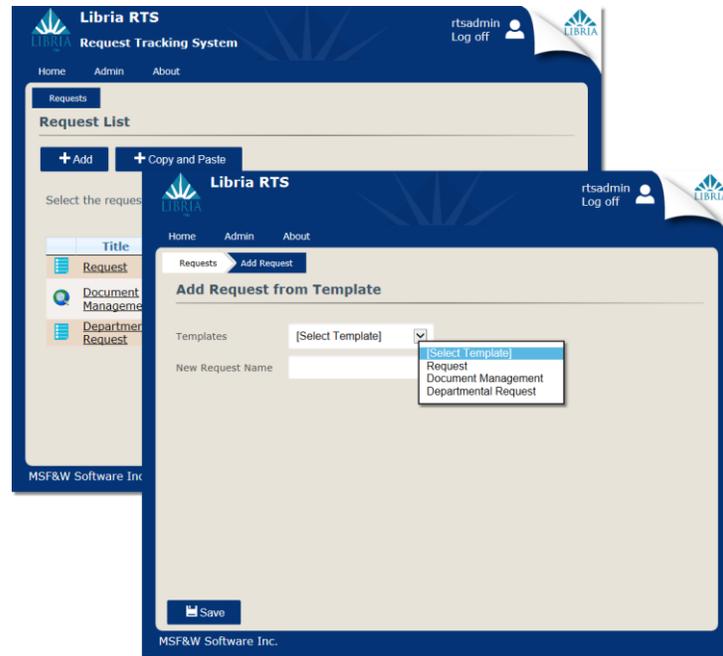
Note:

In order to run reports specific to FOIA reporting, "FOIA" needs to be included in the request type name.

The newly added request type will have a Status of Draft until it has been set to "Go Live".

Copy and Paste:

Copy and Paste can only be used to copy an existing request type and paste it as a new request type, assigning it its own name, within an organization.



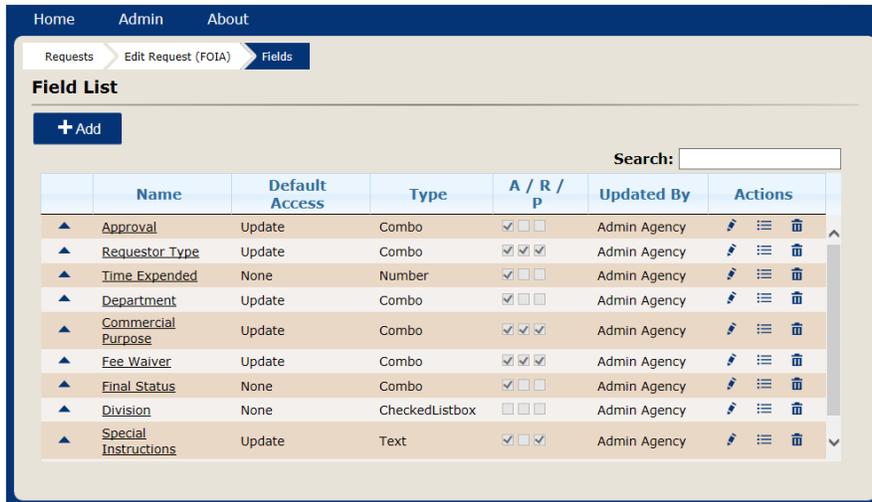
1. Click on Copy and Paste button.
2. Select a request from the Templates drop down.
3. Enter text in the New Request Name field.
4. Click on the Save button.
5. Modifications may need to be made to users, roles, steps and activities.
 - a. Reset Step Role filters such as when assigning Departments to a request.
 - b. SetField type activities need to have the Field Name set.

Request Fields

There are fields that have been built into the system but your organization may need to add additional fields to collect data on a Request type. These fields can be configured for use on the intake screen and/or on steps during the fulfillment process. Fields need to be created for the request type before they are available to be added on a Step Role.

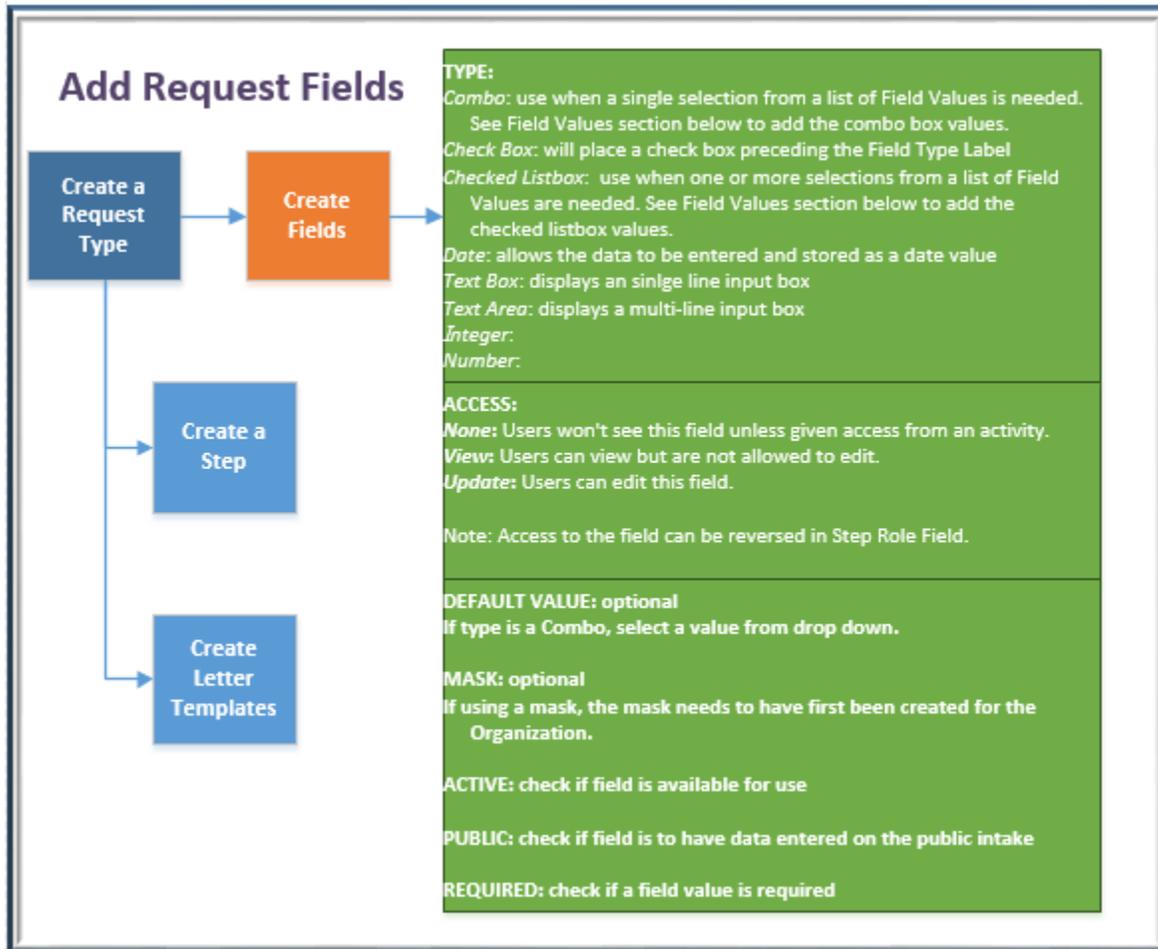
BUILT-IN FIELDS USED ON INTAKE SCREEN		
NAME	LABEL	DESCRIPTION
RequesterName	Requester Name*	Required field: Users are required to fill in data before the request can be submitted. This field would include both first and last name.
Affiliation	Affiliation	
RequesterAddress	Address	
RequesterCity	City	
RequesterState	State	
RequesterZip	Zip Code	
RequesterPhone	Phone	
RequesterEmail	Email*	If the request is being submitted on the public site, this field is required so that the confirmation email may be sent. It is not required when the request is submitted on the internal website.
RequestInformation	Information Requested*	Required Text Area field: Users are required to fill in data before the request can be submitted.
RequestDate	(hidden field-uses create date)	
ResponseType	Preferred Response Method*	Combo values: Download from website, Email, Fax, CD, Paper Documents
SubmissionType	Submission Source	Combo values: Unknown, Online, Email, Fax, Phone, Mail

RESERVED / OPTIONAL FIELD NAMES		
NAME	LABEL	DESCRIPTION
Department	User defined	The Department field is a reserved field and was built into the application to aid in assigning requests to different roles. It is created when a new request type is added as a checklist box field type. Field Values will need to be added if your organization will be using the "Department" field. You may change the Label value but not Name value due to the applications filtering and reporting needs. The Label value is what end users will see. Assigning requests by the "Department" field allows users to filter the Request List by their department.
Exemptions	User defined	Exemptions is a reserved field within Libria. The Exemptions field should be added as a checkbox list field type. The Name needs to be "Exemptions" since it is used to create the FOIA specific Quarterly Exemptions Report. The label can be named whatever your organization wants their end users to see. A list of field values also will need to be added. The checkbox field type allows users to select multiple values.
Approval	User defined	The Approval field is a reserved field that is used to create the FOIA specific Monthly Request Log report. If your organization is creating a FOIA request type, this field needs to be added as a combo box field type along with adding field values. In our example FOIA request we included Approved and Denied as field values and use it to approve or deny the FOIA request.
Final Status	User defined	The Final Status field is a reserved field that is used to create the FOIA specific Monthly Volume Report. It needs to be added as a combo box field type to the request along with adding field values. In our example FOIA request we included Fulfilled, Partial Denial and Full Denial as field values.



Field List View

- **Add button:** used to create new fields for a request.
- **Reorder:** Clicking on the arrow will move the line item up one.
- **Default Access:** displays what type of access users have on the field by default.
- **Name:** the field label.
- **Type:** displays the field type.
- **Updated By:** user who last saved the field type.
- **Actions:**
 - **Edit:** icon that when clicked on opens the edit window for the field type.
 - **Properties:** icon that when clicked opens the properties window for the field type.
 - **Delete:** icon that when clicked on will delete the field type. A dialog will open to verify that you do want to delete the field type.
- **Search:** Entering text will filter the list of fields as you type.



Add Button: Create New Field

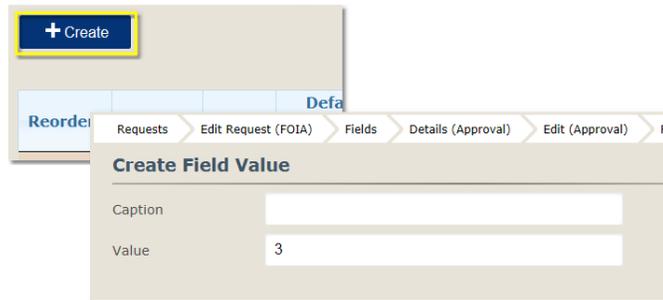
1. From the Edit Request window, select Fields from the menu on the left.
2. Click on the Add button.
3. Name: Enter a name with no spaces for the new field. The Name value is used internally and is not seen by the end user.
4. Description: A description of the field type may be added for help reference. The Description is not visible to the end user. Text entered in Description will be used as hover text when a user is filling out the request form.
5. Label: Enter a label for the field type. The value entered here is seen by users and may contain spaces.
6. Type: Select a type this field needs to be.
 - Combo: use when a single selection from a list of Field Values is needed. See Field Values section below to add the combo box values.
 - Check Box: will place a check box preceding the Field Type Label.
 - Checked Listbox: use when one or more selections from a list of Field Values are needed. See Field Values section below to add the checked listbox values.
 - Date: allows the data to be entered and stored as a date value.
 - Text Box: displays an single line input box.

- Text Area: displays a multi-line input box.
 - Integer:
 - Number:
7. Default Access: Select an option from the drop down list.
 - None: by default, users won't have access to the field. When the user needs access and the default is set to None, set the Field on the Step Role Field to have FieldAccess with View or Update Access.
 - View: users will only be able to view but not update.
 - Update: users will be able to update.
 8. Default Value: Optional. Select from a value from a combo box or enter text to set the default.
 9. Mask: If no mask is needed, skip. Masks are created at the Organization level so that they are available to all Request Types. For further information, see the Masks section.
 10. Active: Place a check mark in the box.
 11. Public: If the field is to be visible on a Public Request intake, place a check mark in the box.
 12. Required: If data is required, place a check mark in the box.
 13. Click on the **Save** button.

Add: Combo and Checked Listbox Field Values

Once the Combo and Checked Listbox Field Type is created, you will want to add Field Values.

1. Click on the Field Values button shown on either the Field Details or Edit Field window.
2. Click on the Create button and the Create Field Value window opens.
3. Fill in the name of the Caption and click on the Save button.
4. Repeat for each Field Value needed.
5. The number entered in Value is incremented by 1 for each Field Value added.



Actions Column

Field Properties Window

Name	Approval
Description	Select the appropriate value to indicate if this request has been Approved or Denied.
Label	Approval
Type	Combo
Default Value	
Mask	
Active	<input checked="" type="checkbox"/>
Public	<input type="checkbox"/>
Required	<input type="checkbox"/>
Updated By	Admin Agency
Update Date	12/27/2013

The Field Properties window displays the property values for the field.

To make edits to these values:

1. Click on the Edit button.
2. Make the changes.
3. Click the Save button.

Fields Edit Window

Name	Approval
Description	Select the appropriate value to indicate if this request has been Approved or Denied.
Label	Approval
Type	Combo
Default Access	Update
Default Value	[Default Value]
Mask	[Select edit mask]
Active	<input checked="" type="checkbox"/>
Public	<input type="checkbox"/>
Required	<input type="checkbox"/>

1. Click on the Edit  icon.
2. Make changes as needed.
3. Click on the Save button.

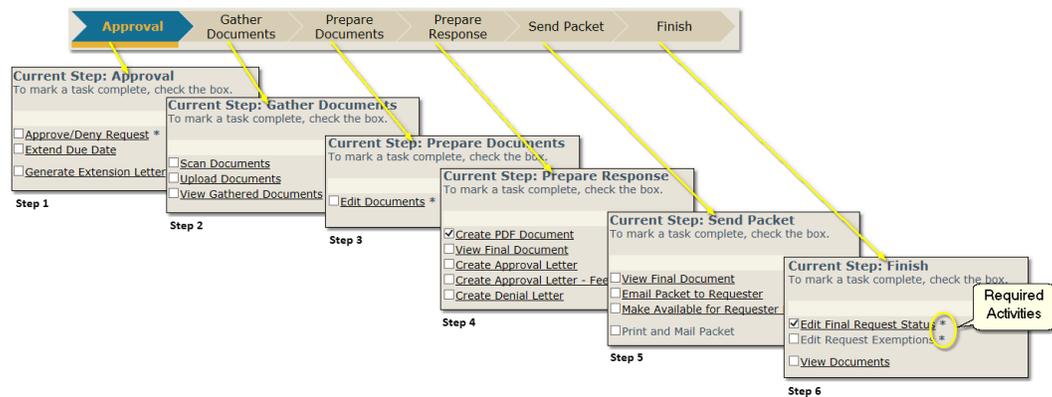
Note: It is not good practice to change the data type the field is after the system has gone live. e.g. from Combo type to Text Box.

Request Steps

Steps will need to be added in order for the request to go through the fulfillment process. The number of steps needed is up to your organization. In the example organization that is used in this manual, there are six steps.



Each step has a set number of activities that need to be performed in order to complete the step. Some activities may be required while others are not. Users are to place a check mark in front of the activity when they have completed it. An activity that is required to complete has an * asterisk next to it. When all the required activities have been completed, the **Complete Step** button appears for the user to send the request into the next step of the fulfillment process.



Adding Steps

Create the steps that will help in fulfilling the request. From the Edit Request window:

1. Click on Steps menu option.
2. Click on Add button.
3. Enter a name for the step in the Name field
4. Enter a description, if needed, to describe the step or give instructions.
5. Click on the Save button.
6. To complete the configuration of a step, here is a checklist to follow. The instructions for each are given below.
 - Click on the step to open the Edit Step window.
 - Add Step Role. See Step Roles below.
 - Edit Step Role
 - Add Fields. See Step Role Fields below.
 - Add Activities. See Step Role Activities below.

Step List Grid

Name	Description	Update Date	Updated By	Actions
Approval	To mark a task complete, check the box.	12/27/2013	Admin Agency	
Gather Documents	To mark a task complete, check the box.	12/27/2013	Admin Agency	
Prepare Documents	To mark a task complete, check the box.	12/27/2013	Admin Agency	
Prepare Response	To mark a task complete, check the box.	12/27/2013	Admin Agency	
Send Packet	To mark a task complete, check the box.	12/27/2013	Admin Agency	
Finish	To mark a task complete, check the box.	12/27/2013	Admin Agency	

The Step List window displays the list of Steps that have already been added for the request.

- **Reorder:** When you click on the arrow for a step, the step will move up one in the list.
- **Name:** Name of the step.
- **Description:** Description of the step.
- **Update Date:** Displays the last date the step was saved.
- **Updated By:** Displays the user who last updated the request.
- **Actions:**
 - **Edit:** clicking on the Edit icon will open the Edit Step window. From Edit Step window you can click on Add Role button.
 - **Properties:** clicking on the Properties icon will open the Step Details window. From the Step Details window you can click on the Edit icon or Add Role button.
 - **Delete:** clicking on the Delete icon will open the Delete Step window. From the Delete Step window you can click on the Delete button to confirm that you do want to delete the step.
- **Search** – The Search box allows the user to filter the Step List making it easier to locate an item.
 - Type the text being searched in the input box.
 - As the user types, the Step List displays only items with the text typed.

Step Roles

Step Details Window

Displays the Roles already on the Step. Each role will have their own set of activities. Role access can be dependent on a field value.

- **Role Name:** displays the Step Role's name.
- **Access:** shows the default access the role has on the step.
- **Update Date:** last date the item was updated.
- **Updated By:** the name of the person who updated the item last.
- **Actions:**
 - **Edit:** icon that when clicked on opens the edit window for the Step Role.
 - **Properties:** icon that when clicked opens the properties window for the Step Role.
 - **Delete:** icon that when clicked on will delete the Step Role. A dialog will open to verify that you do want to delete the Role.

Requests > Edit Request (FOIA) > Steps > Edit (Gather Documents)

Edit Step

Name:

Description:

Step Role List

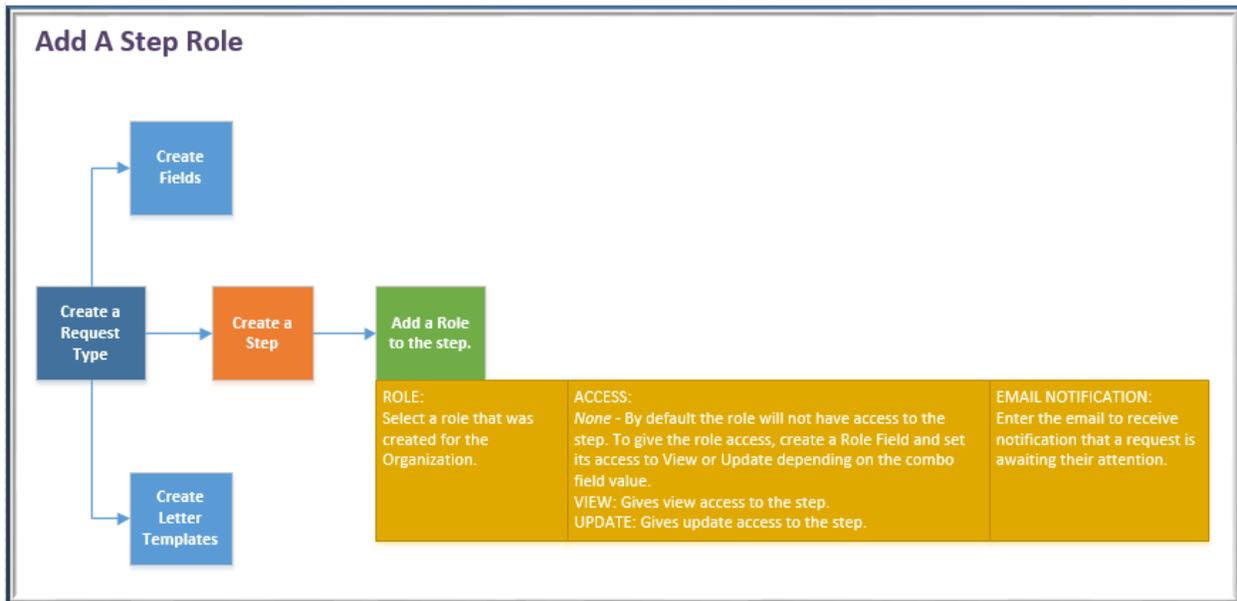
[+ Add Role](#)

Search:

Role Name	Access	Update Date	Updated By	Actions
<u>OrgStaff</u>	Update	12/31/2013	Admin Agency	
<u>Management</u>	None	01/20/2014	Admin Agency	
<u>CountyClerk</u>	None	01/20/2014	Admin Agency	
<u>StatesAttorney</u>	None	01/20/2014	Admin Agency	

[Save](#) [Back To List](#)

Organizational roles are used to add a Step Role. Multiple roles may be added so that the step can be completed by one or more of the roles listed on the step as long as there are activities for the role to complete. A step needs at least one role in order for the activities to be defined.



Adding Step Roles

Home Admin About

Requests > Edit Request (FOIA) > Steps

Step List

+ Add

Search:

Name	Description	Update Date	Updated By	Actions
Approval	To mark a task complete, check the box.	12/27/2013	Admin Agency	
Gather Documents	To mark a task complete, check the box.			
Prepare Documents	To mark a task complete, check the box.			
Prepare Response	To mark a task complete, check the box.			
Send Packet	To mark a task complete, check the box.			
Finish	To mark a task complete, check the box.			

Home Admin About

Requests > Edit Request (FOIA) > Steps > Edit (Gather Documents) > Create

Add Step Role

Role: [Select a Role]

Access: None

Email Notification:

Active

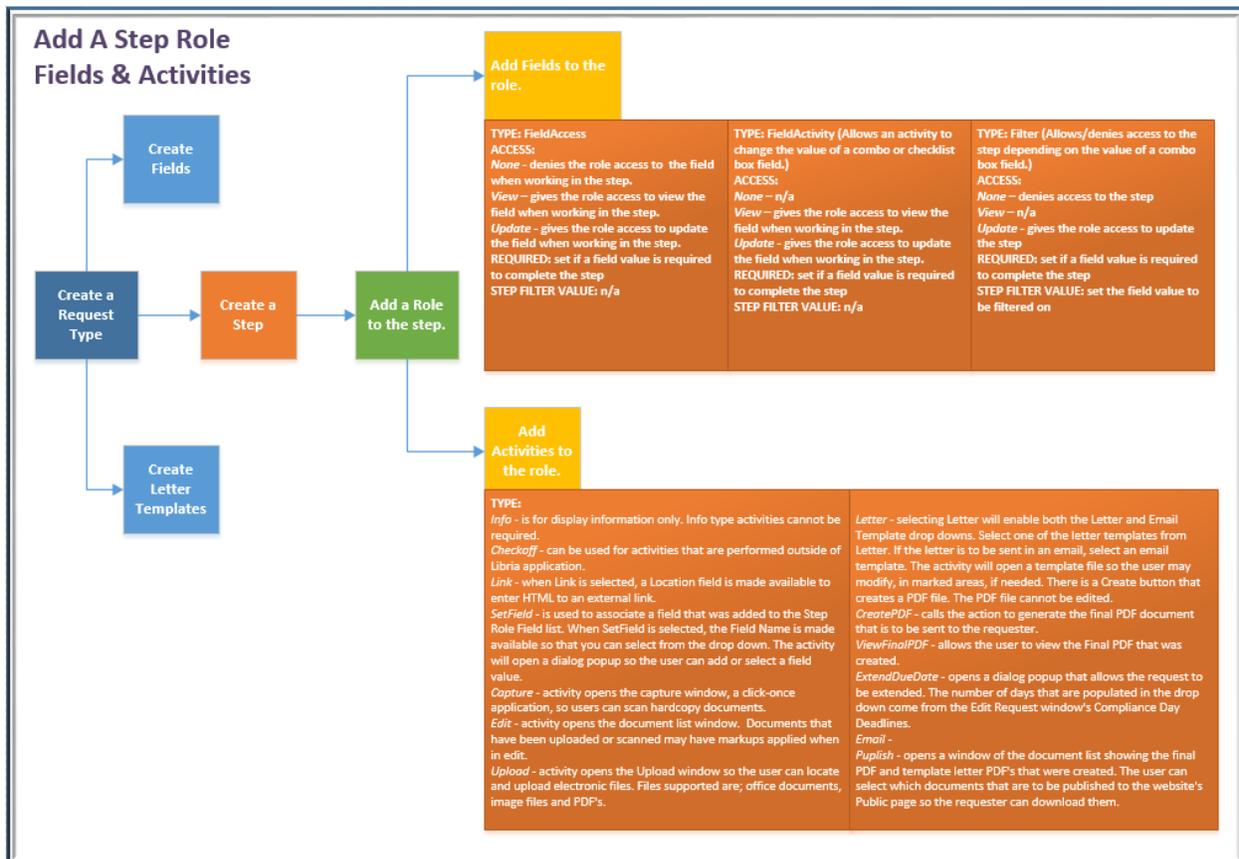
1. Click on the Step name in the Step List window to open the Edit Step window which will allow the admin user to add Step Roles.
2. Click on Add Role button.
3. The Add Step Role window opens.
4. Select a role from the drop down. See Roles / Users / Passwords to see how to add the Organization Roles.
5. Select the Access type of View, Update or None the role should have by default. When only a single role is added to the step, Access should = Update.

- None – by default won't have access to the step. When set to "None", access is given to the step by adding a Step Role Field combo box field with the Type setting = Filter and setting the Step Filter Value.
 - Update - allows access to the step by default.
 - View - allows access to the step by default.
6. If the role is to receive email that will notify them when a request enters the step, enter the email address. Only one email account may be entered. If the notification is to be sent to multiple people, it is suggested to use an email distribution email address.
 7. Place a check mark in the Active box.
 8. Click the **Save** button.

Add the number of roles that are needed to complete their own set of activities.

Step Role Fields

Request Fields are used to add Step Role Field entries. Fields added to the Step Role Fields can be configured to control role access to the step and or the ability to edit the field being defined.

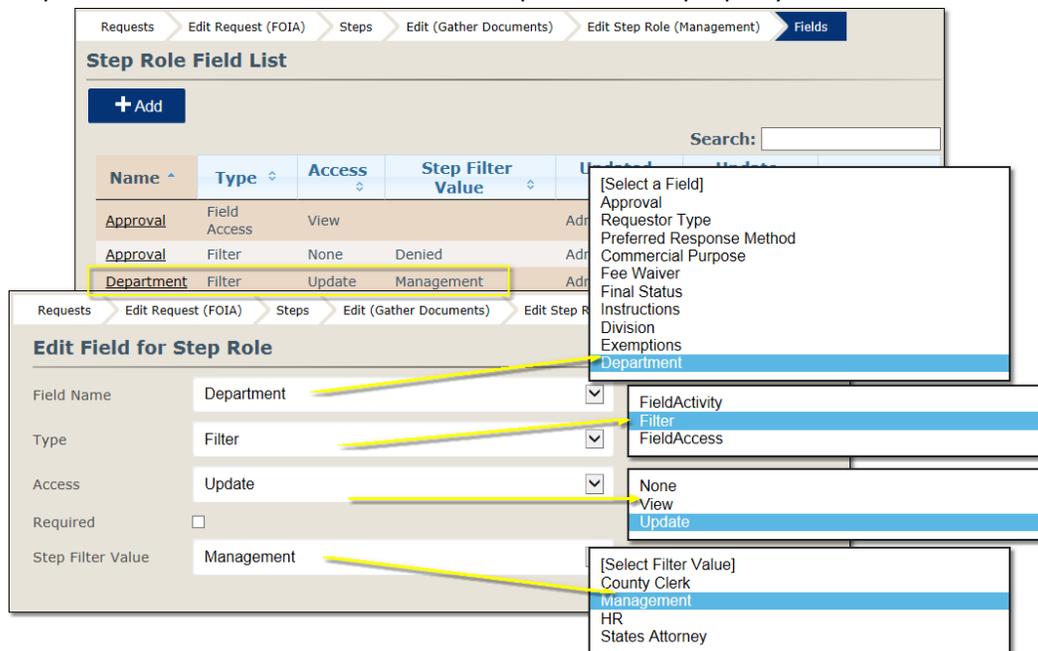


Adding Step Role Fields

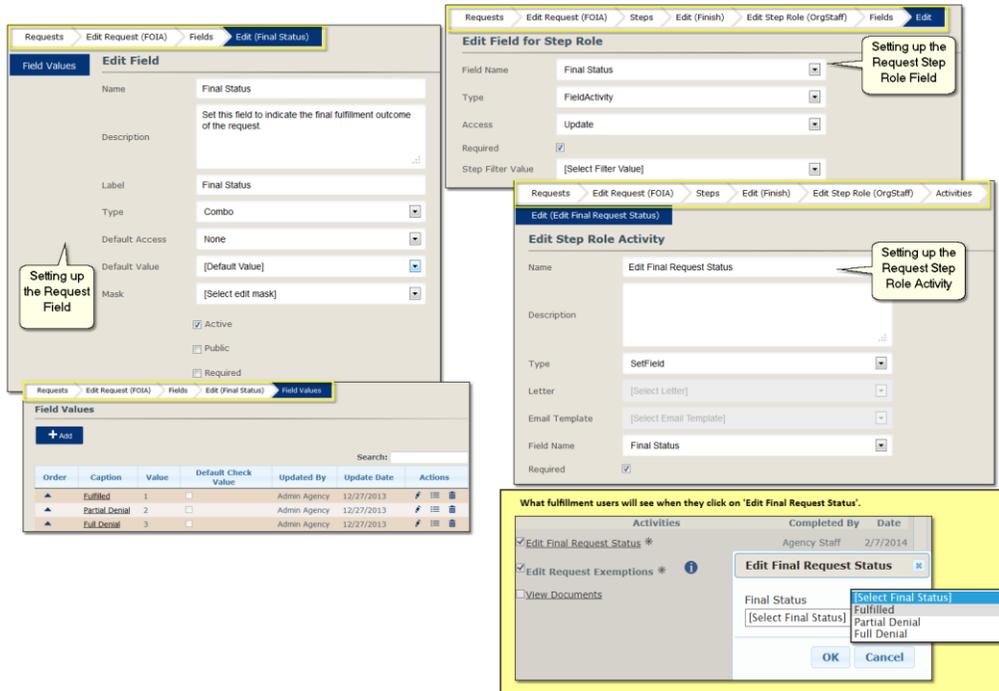
Create the step role field that will help in fulfilling the request.

1. From the Edit Request window
2. Click on Steps link

3. Click on the Step you will be adding Role Fields to
4. Click on the Role Name
5. Click Fields link
6. Click on +Add
7. Field Name: Select a field from the drop down list. The fields in the drop down list are populated with the values created with the request type fields.
8. Type: Select the Type from the drop down list
 - FieldActivity: allows the field to be available for a SetField activity. E.g. set a value on a combo box.
 - FieldAccess: allows the value to be changed on the Request Field's Default Access.
 - Filter: May be used to filter if the request will skip the step depending on the value of a combo box field or when using the built in field Department to control if a role will have access to the step. The filter is on the value set in the Step Filter Value property.



- FieldActivity: Will pop-up a dialog to allow the user to change or enter the value of the field selected in Field Name when the Access is Update.



9. Access: Select one of the three options

- None - the role has won't have View or Update rights.
- View - gives the role view rights on the field.
- Update - gives the role update rights on the field.

10. Required: only used on FieldActivity; field validation is performed when the Complete Step is submitted.

11. Step Filter Value: Used when Type is Filter. The field selected in Name should be a combobox or a checkbox list field type so that the field values are shown in Step Filter Value drop down list.

12. Click on the Save button.

In some instances there may need to be two entries for that same Request Type field. One to give the role access, FieldAccess, and the other to allow for FieldActivity or when using the Filter.

Validating field values in order to complete the step

To have the “Complete step” validate a field activity you need the step role field properties set as follows:

- Type = FieldActivity
- Access = Update
- Required = checked

Requests > Edit Request (FOIA) > Steps > Edit (Finish) > Edit Step Role (OrgStaff) > Fields > Edit

Edit Field for Step Role

Field Name: Final Status
Type: FieldActivity
Access: Update
Required:
Step Filter Value: [Select Filter Value]

Note: Marking the required on a step role field with a **FieldAccess** type will not validate a field value.

Step Validation seen by fulfillment user:

Current Step: Approval
To mark a task complete, check the box. Due On: 02/12/2014

Activities: Approve / Deny Request *
 Extend Due Date
 Generate Extension Letter
 Assign Department

Completed By: Admin Agency Date: 2/5/2014

Step Validation
Complete step validation error(s):
Approval: Field value required

OK

* indicates required activities to complete the step

This image shows an example of using a Step Role Field type of Filter.

Requests > Edit Request (FOIA) > Steps > Edit (Gather Documents)

Edit Step
Name: Gather Documents
Description: To mark a task complete, check the box.

Step Role List
+ Add Role

Role Name	Access
Management	None
CountyClerk	None
StatesAttorney	None
OrgStaff	Update

Requests > Edit Request (FOIA) > Steps > Edit (Gather Documents) > Edit Step Role (Management)

Edit Step Roles
Role: Management
Access: None

Requests > Edit Request (FOIA) > Steps > Edit (Gather Documents) > Edit Step Role (Management) > Fields

Step Role Field List
+ Add

Name	Type	Access	Step Filter Value	Updated By	Update Date	Actions
Approval	Field Access	View		Admin Agency	01/16/2014	
Approval	Filter	None	Denied	Admin Agency	01/16/2014	
Department	Filter	Update	Management	Admin Agency	01/22/2014	

Step Role Activities

At a glance, the Step Role Activity List gives you information on Name, Description, Type, Required, Update Date and Updated By.

Requests > Edit Request (FOIA) > Steps > Edit (Approval) > Edit Step Role (OrgStaff) > **Activities**

Step Role Activity List

[+ Add](#) Search:

Order	Name	Description	Type	Required	Update Date	Updated By	
▲	Approve / Deny Request		SetField	<input checked="" type="checkbox"/>	01/16/2014	Admin Agency	✎ ☰ 🗑
▲	Extend Due Date	If a request cannot be fulfilled within 5 business days, an extension letter must be sent to requester.	ExtendDueDate	<input type="checkbox"/>	12/27/2013	Admin Agency	✎ ☰ 🗑
▲	Generate Extension Letter		Letter	<input type="checkbox"/>	01/17/2014	Admin Agency	✎ ☰ 🗑
▲	Assign Department		SetField	<input type="checkbox"/>	01/22/2014	Admin Agency	✎ ☰ 🗑

Create the Step Role Activity.

1. From the Edit Request window
2. Click on Steps link
3. Click on the Step you will be adding Role Activities to
4. Click on the Role Name
5. Click Activities link
6. Click on +Add
7. Name: enter a name for the activity
8. Description: enter a description of the activity if needed

Requests > Edit Request (FOIA) > Steps > Edit (Approval) > Edit Step Role (OrgStaff) > Activities > **Edit (Approve / Deny Request)**

Edit Step Role Activity

Name:

Description:

Type:

Letter:

Email Template:

Field Name:

Required:

9. Type: select what type the activity is
10. If the type is:
 - **Capture** - activity opens the capture window, a click-once application, so users can scan hardcopy documents. Electronic files may also be uploaded or drag and dropped in the scan window.
 - **Checkoff** - can be used for activities that are performed outside of Libria application.
 - **CreatePDF** - calls the action to generate the final PDF document that is to be sent to the requester.

- **Edit** - activity opens the document list window. Documents that have been uploaded or scanned may have markups applied when in edit.
 - **Email** -the Email activity type opens a dialog that allows the staff user to select which files are to be sent to the requester. The available files are the final CreatedPDF and letters that have been created using the predefined templates.
 - **ExtendDueDate** - opens a dialog popup that allows the request to be extended. The number of days that are populated in the drop down come from the Edit Request window's Compliance Day Deadlines.
 - **Info** - is for display information only. Info type activities cannot be required.
 - **Letter** - selecting Letter will enable both the Letter and Email Template drop downs. Select one of the letter templates from Letter. If the letter is to be sent in an email, select an email template. The activity will open a template file so the user may modify, in marked areas, if needed. There is a Create button that creates a PDF file. The PDF file cannot be edited.
 - **Link** - when Link is selected, a Location field is made available to enter HTML to an external link.
 - **Publish** - opens a window of the document list showing the final PDF and template letter PDF's that were created. The user can select which documents that are to be published to the website's Public page so the requester can download them.
 - **SetField** - is used to associate a field that was added to the Step Role Field list. When SetField is selected, the Field Name is made available so that you can select from the drop down. The activity will open a dialog popup so the user can add or select a field value.
 - **Upload** - activity opens the Upload window so the user can locate and upload electronic files. Some of the file types that are allowed are: DOC, DOCX, XLS, XLSX, RTF, TXT, PDF, WAV, AVI, ZIP and image file formats. DOC, DOCX, XLS, XLSX, RTF, TXT and PDF files will be converted into image files along with uploading them in their native format. WAV, AVI and ZIP files cannot be converted to image files. To allow for other file types, add the file extension in the web.config file.
 - **ViewFinalPDF** - : is a link that opens the final document created by the CreateFinalPDF activity allowing the user to view the Final PDF before sending it to the requester.
11. Letter: select the template to be used when Letter type is selected.
 12. Email Template: select the email template to be used if the Letter is to be sent by email at time of creation.
 13. Field Name: when type is SetField, select the field associated with the activity.
 14. Required: check if the activity is to be required before the Step can be completed.

Note:

A CreatePDF activity type and a ViewFinalPDF activity type need to be on the same step.

A Create PDF activity has to be completed before the final request document can be published.

Example of two roles having activities on the same step:

The screenshot displays the Libria Administrator interface for a Government Agency. The main navigation includes Home, Requests, Settings, Masks, Roles, Users, About, and Contact. The current view is 'Admin View' for the 'Edit (Gather Documents)' step.

The 'Step Role List' table shows the following roles:

Role Name	Access	Update Date	Updated By
OrgStaff	Update	12/31/2013	Admin Agency
Management	Update	01/16/2014	Admin Agency

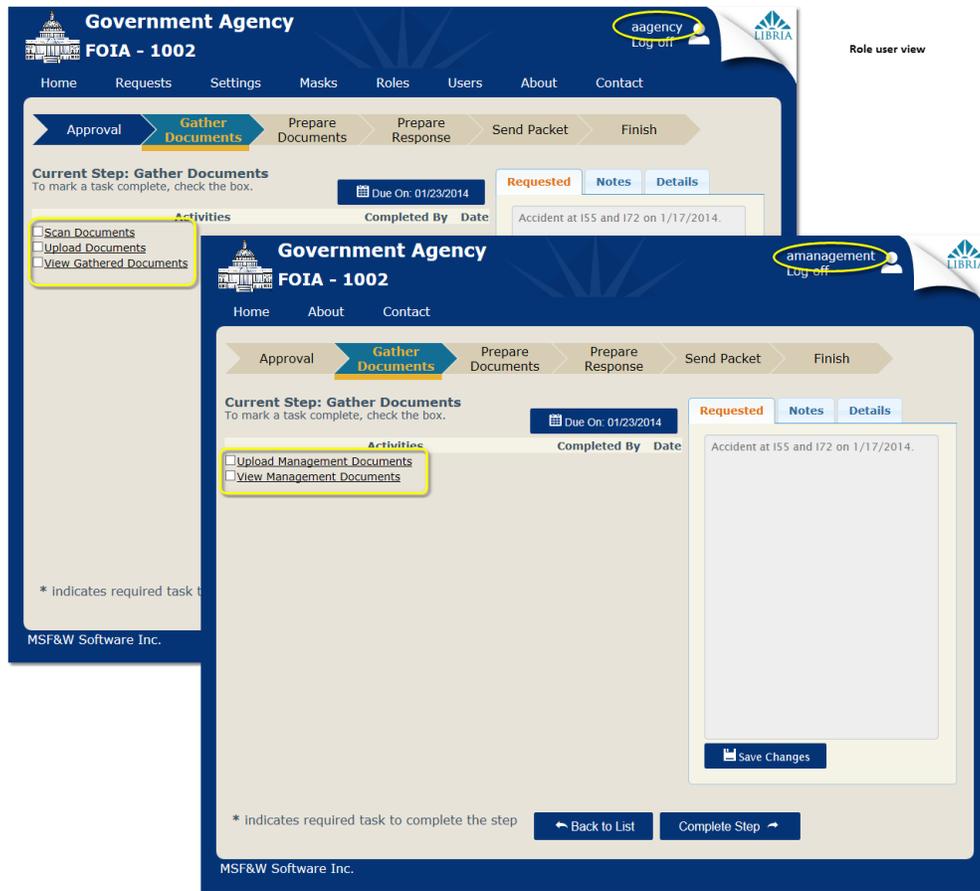
Two overlapping 'Step Role Activity List' windows are shown:

- Edit Step Role (OrgStaff):** Lists activities for the OrgStaff role:

Order	Name	Description	Type	Required	Update Date	Updated By
▲	Scan Documents		Capture	<input type="checkbox"/>	12/31/2013	Admin Agency
▲	Upload Documents		Upload	<input type="checkbox"/>	12/31/2013	Admin Agency
▲	View Gathered Documents		Edit	<input type="checkbox"/>	12/31/2013	Admin Agency
- Edit Step Role (Management):** Lists activities for the Management role:

Order	Name	Description	Type	Required	Update Date	Updated By
▲	Upload Management Documents		Upload	<input type="checkbox"/>	01/16/2014	Admin Agency
▲	View Management Documents		Edit	<input type="checkbox"/>	01/16/2014	Admin Agency

MSF&W Software Inc.



Skipping a Step

Step Role Field List

+ Add

Search:

Name	Type	Access	Step Filter Value	Updated By	Update Date	
Approval	FieldAccess	View		Admin Agency	01/16/2014	
Approval	Filter	None	Denied	Admin Agency	01/16/2014	

In this example, the Gather Documents step is skipped when the Approval combo field value selection is "Denied". To configure skipping a step in the process set up an Activity Field Filter.

1. On the Step Role Field, add the Field Name
2. Set the Type = Filter
3. Set Access = None
4. Set Step Filter Value = if this value, the request is to bypass the step

Letter & Email Templates

There are two types of Templates that may be created and used to respond to requesters, Email and Letter. Email Templates are used as the body of an email. Letter Templates, when created during a fulfillment, are created as a PDF file and can either be attached to the email or printed and sent through the postal system.

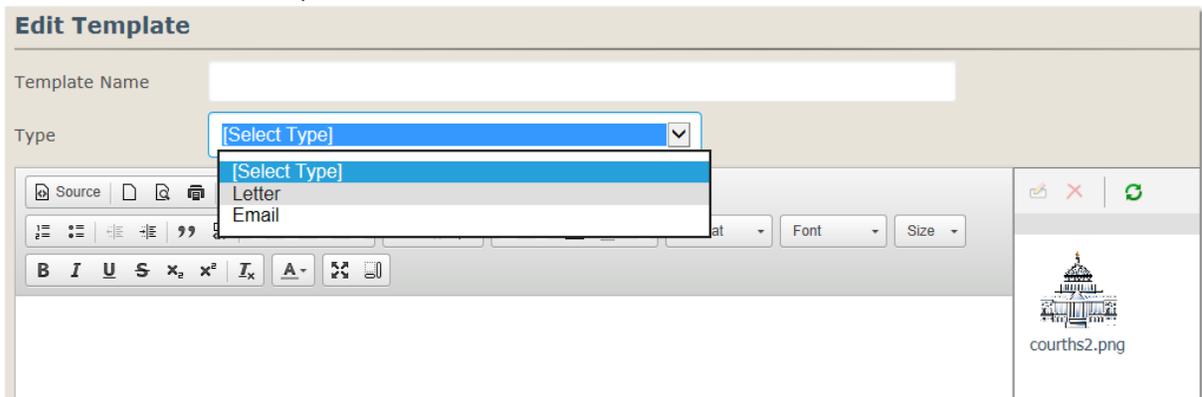
Templates are used to define a Letter type of Activity. It works best if your templates have been created before configuring Step Activities.

Creating a new template for a Request type:

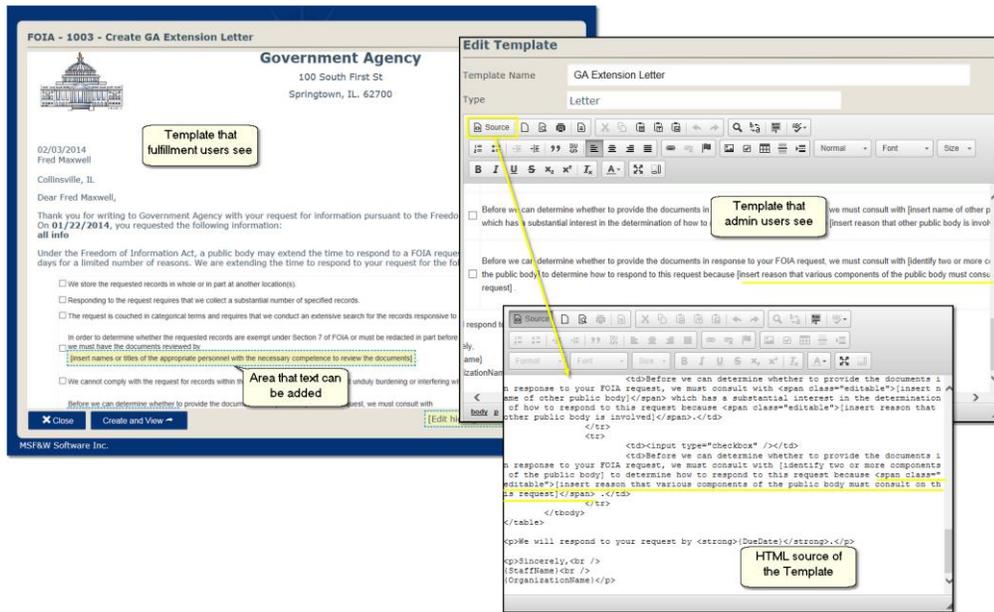
1. Log into Libria as a user that belongs to OrgAdmin role.
2. From the menu bar, click on the Requests link.



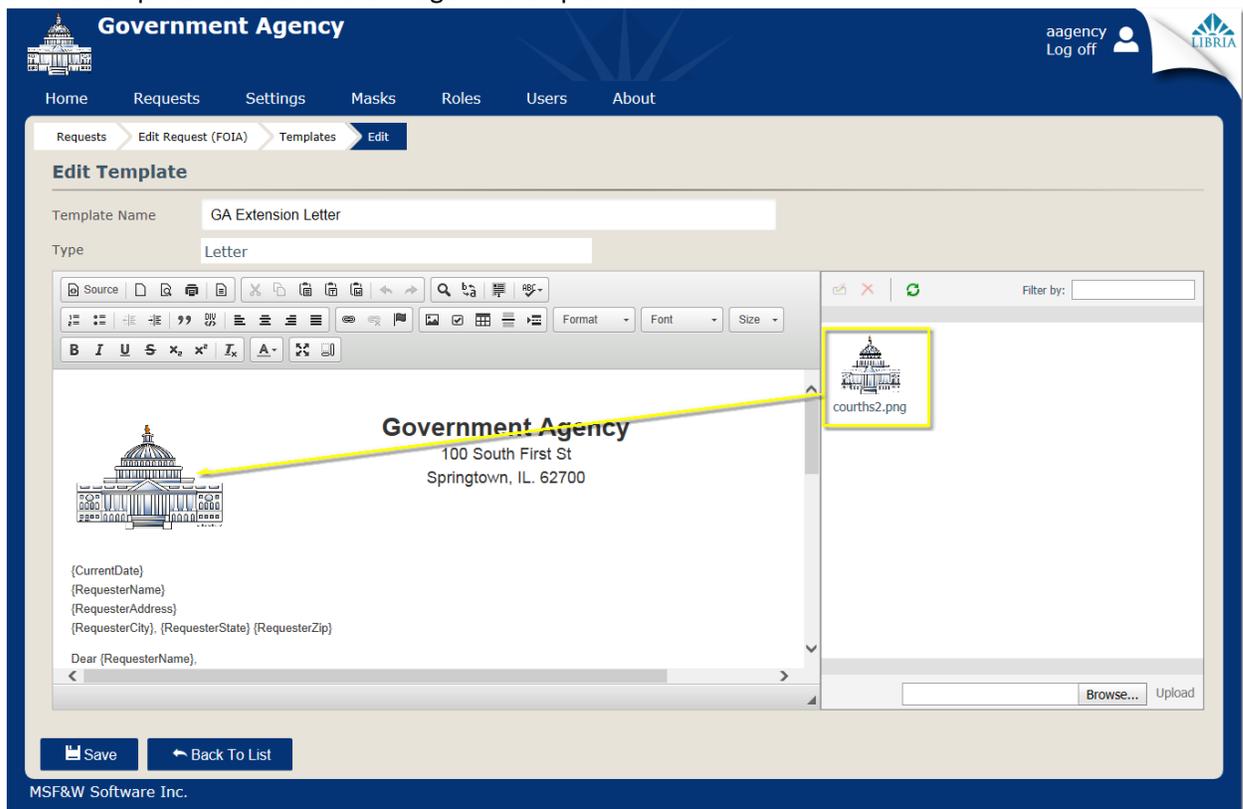
3. On the request that you will be adding a new template to, click on the Details link or the Title link.
4. In the upper left, click on the Templates link.
5. Click on Add button.
6. Enter the title of the template in the “Name” field.



7. Select Letter or Email for the “**Type**” drop down list.
 - Letter is used to print for mailing or to attach the PDF file to an email.
 - Email is used to email a Letter PDF file.
8. Add text in the body area of the letter.
9. If the letter is to be modified by the fulfillment user, the html SPAN element will need to be added to the Source of the template using the following class.
 - `[insert reason that various components of the public body must consult on this request]`
 - An Input type HTML element of “Checkbox” can also be used to select line items on the template.

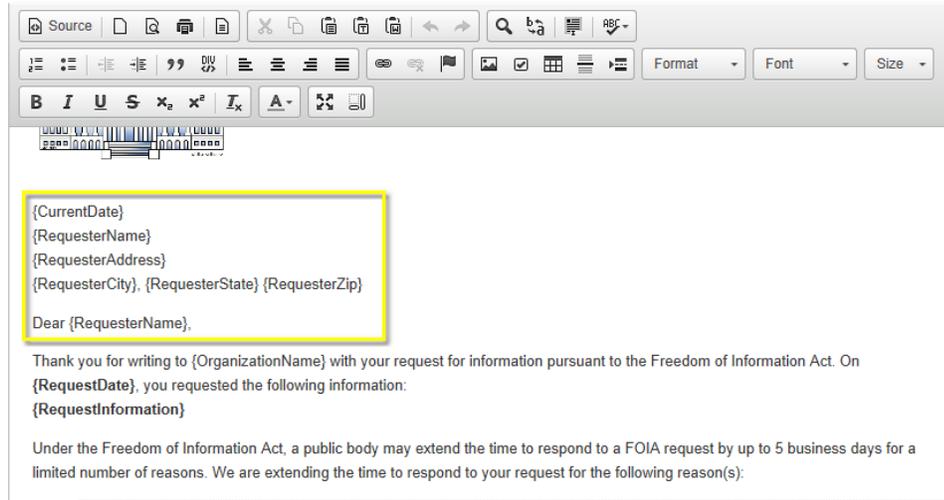


10. A logo may be added to the template by using the image upload window to the right of the template area. Locate the image by clicking on Browse, then click on Upload. Drag the image to the location on the template. It is best if the image that is uploaded is small.



11. Add built in fields, placing them within curly brackets, where needed. Built in fields are used with mail merge to pull in data that was taken from the intake screen.

12. Meta data fields, custom to your organization, can also be used with mail merge by adding the field name within curly brackets.
 - a. Meta data fields used in mail merge cannot have spaces in the name.
 - b. Currently checklist box field types cannot be used in templates.



Built In System Fields used for Replacement Parameters

1. When adding replacement parameters to email and letter templates, the parameter needs to be placed within curly brackets as shown below.
 - {Affiliation}
 - {CurrentDate}
 - {DueDate}
 - {OrganizationDescription}
 - {OrganizationName}
 - {RequesterName}
 - {RequesterAddress}
 - {RequesterCity}
 - {RequestDate}
 - {RequestDescription}
 - {RequestDetailsLink}
 - {RequesterEmail}
 - {RequestInformation}
 - {RequesterPhone}
 - {RequesterState}
 - {RequestTitle}
 - {RequesterZip}
 - {ResponseType}
 - {StaffName}
 - {TrackingNumber}

2. Click the Save button when completed.

Testing your Request Type before “Go Live”



1. On the Request List window, click on the icon located to the left of the Request Title still in Draft status.
2. An Enter a new %RequestType% window will open for you to work through the steps. The newly added request is viewable on the Home Request List but only to those you have given role access. NOTE: A test role may be used to limit who views the test items and the role later changed before setting the Request Type to Go Live.

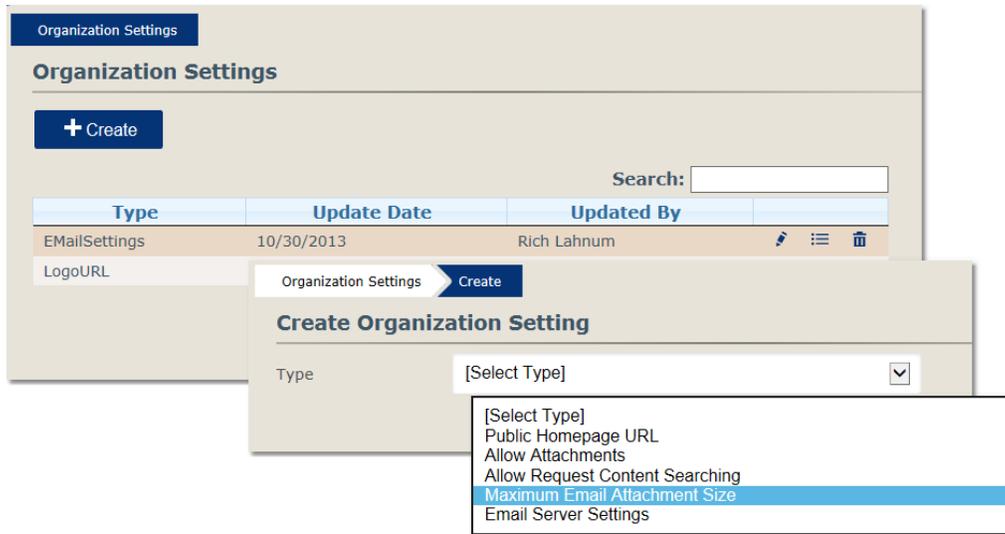


3. When you are satisfied with the configuration of the Request Type, delete the test requests by opening the request and clicking on the Delete button located at the bottom of the window.

Settings

Libria has built-in settings that will help in configuring an organization. The settings are for an organization and therefore include all request types for the organization.

- **Allow public attachments:** this setting allows users creating a request through the public request intake website to upload file attachments to their request. The ability to upload is available on the confirmation window after the request has been submitted. This is a True/False setting.
- **EMailSettings:** the settings need to include the Server Name, Port, Account Name and Password of the email account where outgoing emails to a requester are sent from.
- **Public Homepage URL:** adds a link to the main title on the public request intake page.
- **Allow public content search:** allows users to search by keyword(s) from the public website. A minimum of 3 characters is needed to perform a search. This is a True/False setting.
- **Maximum Email Attachment Size:** will set a maximum attachment size that is allowed to be sent through an outgoing email. (5, 10, 15, 20, 25 MB) If the final PDF document is over the maximum size allowed, you can reset the size up to 25 MB or consider publishing it to the website for the requester to download.



Organization Settings Window

- Type: displays the name of the setting
- Update Date: displays the last date the setting was saved
- Updated By: displays the user who last saved the setting
- Actions:
 - Edit: click  to enter edit mode for the setting
 - Properties:  click to view the property values of the setting
 - Delete:  click to delete the setting

Add a Setting

1. Click on the Add button. An Add Organization Setting window will open.
2. Select the Type of Setting being created.
 - For Allow public attachments:
 - Set to True, allows the public user to upload electronic files on the confirmation window after the request has been submitted.
 - Set to False (default) will not allow a public user to upload electronic files.
 - For Allow public content search:
 - Set to True, allows the public user to search on request content using full text search capability. A minimum of 3 characters is required to perform the search.
 - Set to False (default) will not display the Key Word search text box.
 - For Public Homepage URL:
 - Text Value: enter a URL e.g. Business' website home page.
 - Will allow users to click on the site's logo to access the URL entered.
 - For Email Server Settings: Address used for outgoing emails. E.g. Template letters and final pdf request.
 - Email Server Name: enter the name of the email server
 - Port: enter the port number
 - Account Name: enter the email account name

- Password: enter the account's password
- For Maximum Email Attachment Size: Used to give users a notification pop up that the attachment has exceeded the maximum size allowed.
 - Select from the drop down 5, 10, 15, 20 or 25 MB.

3. Click on the Save button.

Edit a Setting

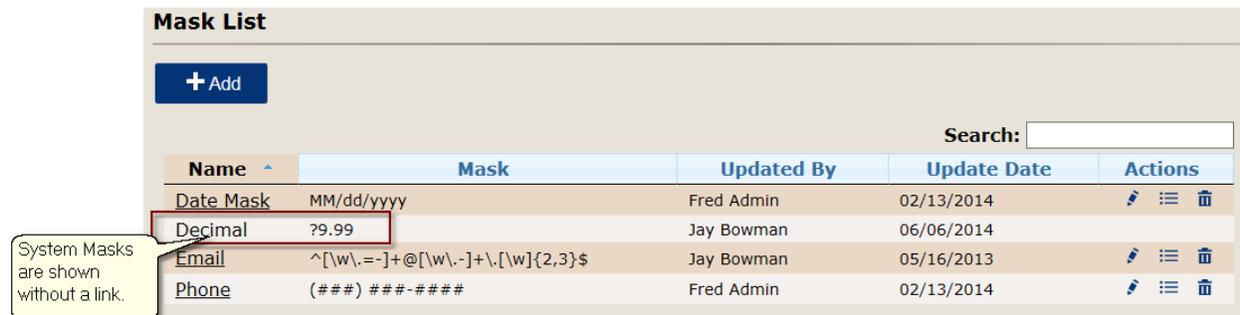
1. From the Organization Settings window, click on the Edit  icon of the setting you want to edit.
2. Make the necessary changes.
3. Click on the Save button.

Masks

Masks may be added to help format an Organization's Request Field Type data.

Mask List Window

There may be masks that are system masks. System masks are listed along with the organization's masks on the Organization Masks list but won't have a link to allow for edits. Edits and/or creation of system masks can be performed by a user belonging to the Admin role.



Mask List

[+ Add](#)

Search:

Name	Mask	Updated By	Update Date	Actions
Date Mask	MM/dd/yyyy	Fred Admin	02/13/2014	
Decimal	?9.99	Jay Bowman	06/06/2014	
Email	^[\\w\\.=-]+@[\\w\\.=-]+\\.([\\w]{2,3})\$	Jay Bowman	05/16/2013	
Phone	(###) ###-####	Fred Admin	02/13/2014	

System Masks are shown without a link.

- Name: name of the mask
- Mask: configuration of the mask
- Updated By: displays the user who last saved the mask
- Update Date: displays the last date the mask was saved
- Actions:
 - Edit: click to enter edit mode for the mask
 - Properties: click to view the property values of the mask
 - Delete: click to delete the mask

Add a Mask

1. Click on the Add button to open the Create Mask window.
2. Name: Enter the name of the mask.
3. Mask: use expressions to control formatting.

- e.g. phone number: (###) ###-####
- Date: MM/dd/yyyy
- Email: ^[\\w\\.=-]+@[\\w\\.=-]+\\.([\\w]{2,3})\$

- Decimal: ?9.99

4. Click on the Save button.

Edit a Mask

1. From the Organization Masks window, click on the Edit  icon of the mask you want to edit.
2. Make the necessary changes.
3. Click on the Save button.

Roles and Users

System Roles

Libria Request Tracking system comes with 3 internal system roles; Admin, OrgAdmin and OrgStaff.

Additional Roles may be added to control staff security access on individual Step Activities.

Admin:

Users belonging in the Admin role have rights to create or modify system configurations.

- Organizations
- Settings
 - Email
 - General
- Masks - systems masks are available to all organizations.
- Roles -
- Users

OrgAdmin:

Users belonging to OrgAdmin role have rights to create and modify the following items.

- Organization Request types,
 - Steps
 - Activities
 - Fields
 - Templates
- Organization Settings
- Organization Masks
- Organization Roles
- Organization Users

OrgStaff:

Users belonging to OrgStaff role, by default, have rights to perform the necessary activity functions within the Steps.

- View
- Update the status
- Upload documents
- Prepare documents by using redactions
- Move the requests through its various steps

- Perform the necessary task actions within each step
- Produce necessary response letters by using templates within the system
- Email response letters from within the system
- Add extensions to the response time
- Send out “packets” using email or by printing

Creating a Organization Role

There may be some instances where roles other than the two default roles are needed. Custom roles can be used for Step security and/or assignment purpose. The field “Department” was built into the application in order to help in assigning requests.

1. Log into Libria as a user that belongs to OrgAdmin role for the Organization.
2. From the menu bar, click on the Role link.
3. Click on the Add button.
4. Enter the name of the new Role.
5. Click on the Save button.

Add Users to the new role:

1. Click on the new role name.
2. Click on View Users button.
3. Select user from drop down and click on Add User to Role button.
4. A user cannot belong to a custom role AND the OrgAdmin or OrgStaff role.

Creating A New User / Add User to a Role

When a new user is needed and the role already exists, you can add the user to the role while creating the new user.

1. Log into Libria as a user that belongs to OrgAdmin role.
2. From the menu bar, click on the Users link.
3. Click on the Add button.
4. Enter the users “Last Name”, “First Name”, “Login ID” and “Email” in the appropriate fields.
5. Select the Organization from the drop down the user will need access to.
6. Check which roles the user will belong to.
7. A user can belong to one or both internal roles (OrgAdmin or OrgStaff).
8. A user cannot belong to a custom role and one of the internal roles.
9. Click on the Save button.

Reports

Reports specific to FOIA reporting:

Monthly Volume Report gives a summary of request totals based on the values of a metadata field named “Final Status”. Set the date range and click on the **View Report** button. If this report produces an error verify that the request type has “Final Status” as a field. “Field Status” needs to be created as a combo box field type and given field values.

Monthly Request Log report produces a list of requests received for the date range selected based on the values of the metadata field named “Approval”. Set the date range and click on the **View Report**

button. If this report produces an error verify that the request type has “Approval” as a field. “Approval” needs to be created as a combo box field type and given field values.

Quarterly Exemptions Report lists a summary of exemptions for processed requests by quarter. This report is based on the values of a metadata field named “Exemptions”. It is also dependent on the request type having FOIA as a part of its name. “Field Status” needs to be created as a checkbox list field type and given field values.

Other reports:

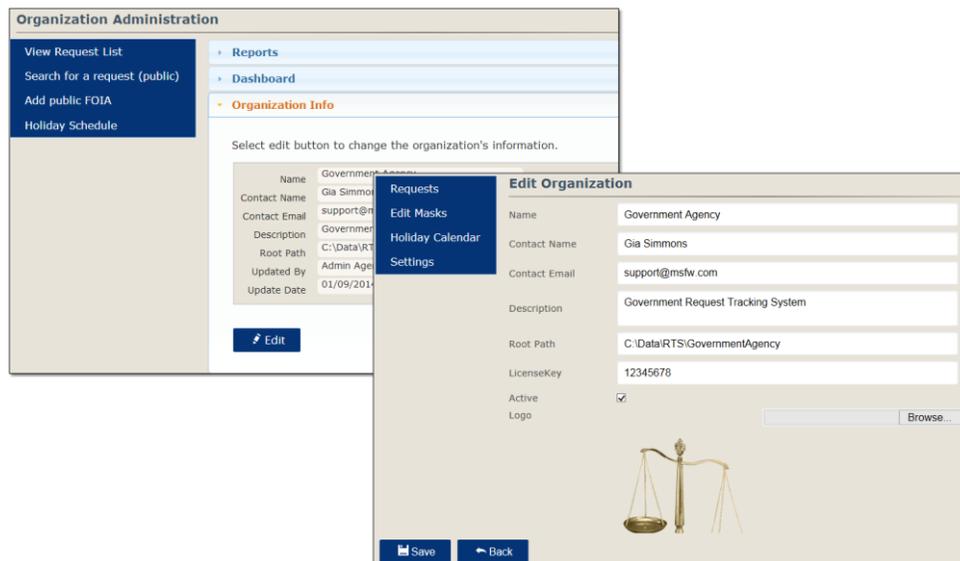
Request Processing Time Report gives total of number of requests received, and processed along with the average, lowest and highest number of days to complete for the date range selected. Set the date range and click on the **View Report** button.

Past Due Request Report displays a list of requests that are past due based on the request types Compliance Day Deadlines configuration.

Request Summary by Affiliation Report displays requests grouped by Affiliation for the date range selected. Set the date range and click on the **View Report** button.

Activity Report by Month

Organization Info



Organization information can be viewed by clicking on the Organization Info link.

To make edits to the existing information, click on the Edit button. Make the necessary changes and click on the Save button.

Creating an Organization

1. Log in as a Super Admin user.
2. Click on Organization from the menu bar.
3. Click on the Add button.

4. Enter the information needed.
 - a. Name: Enter a name for the organization.
 - b. Contact Name:
 - c. Contact Email: This email will be the address that is used when requesters reply to any notifications they receive.
 - d. Description: displays as a subtitle under the organization name on the site.
 - e. Root Path: this will be the path where documents are to be stored.
 - f. LicenseKey: enter the key given to you by MSF&W, Inc.
 - g. Active: place a check in the Active box.
 - h. Logo: Browse and upload the logo for the organization site.
5. Click on the Save button.

Installation Requirements and Quick Setup

Minimum Requirements

Server

Windows Server 2008; server requirements can be found at <http://technet.microsoft.com/en-us/windowsserver/bb414778.aspx>.

To be able to run Libria successfully, the following will need to be installed on the server:

- SQL Server 2005 Standard or SQL Server 2005 Express may be used keeping in mind the scalability and performance of SQL Server Standard versus SQL Server Express. e.g SQL Server Express supports only 1 CPU, 1 GB RAM and a 4 GB maximum database size
- Microsoft .Net 4.5 <http://www.microsoft.com/en-us/download/details.aspx?id=30653>
- IIS 7.0; comes with Windows Server 2008
- Microsoft Report Viewer Redistributable 2012 <http://www.microsoft.com/en-us/download/details.aspx?id=35747>
- Microsoft Visual C++ 2010 SP1 Redistributable Package (x86) <http://www.microsoft.com/en-us/download/details.aspx?id=8328>

Scanning Clients

- Microsoft .Net 4.5 <http://www.microsoft.com/en-us/download/details.aspx?id=30653>
- Microsoft Visual C++ 2010 SP1 Redistributable Package (x86) <http://www.microsoft.com/en-us/download/details.aspx?id=8328>

Web Browsers

- Have Adobe Reader Add-in/Plugin enabled to load into the browser window.
- Add an exception for Libria's website to allow popups.

Install Libria – New Install

Installing Libria on the server for the first time.

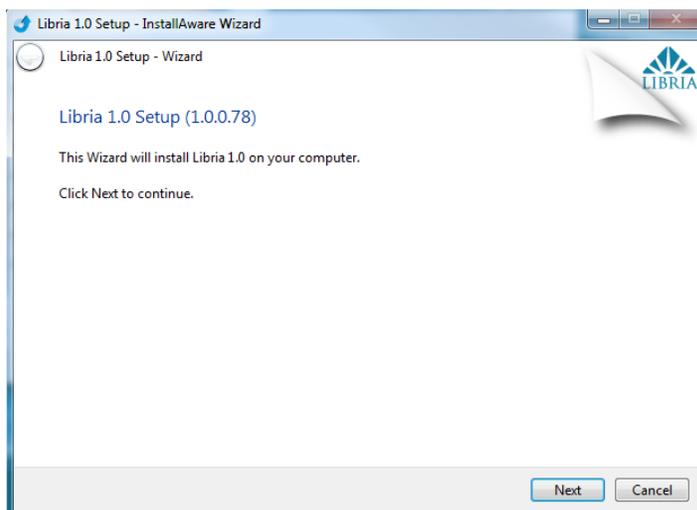
1. Things you will need:

- Port number
- DataBase Server, login, password

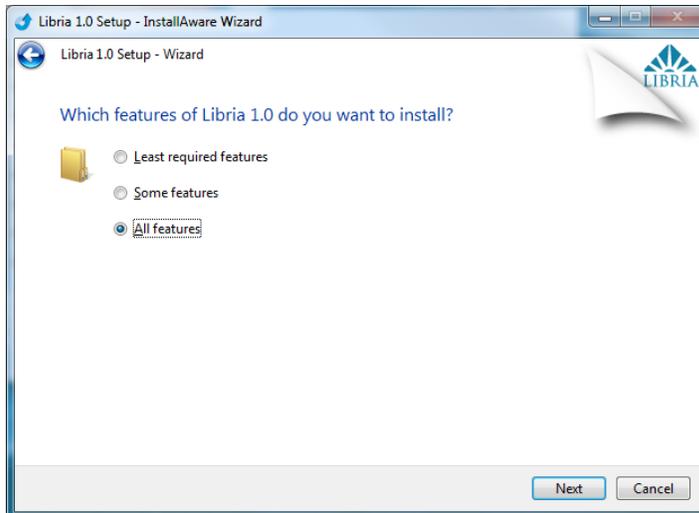
2. Click on Libria 1.0 installer.



3. Click on Run.

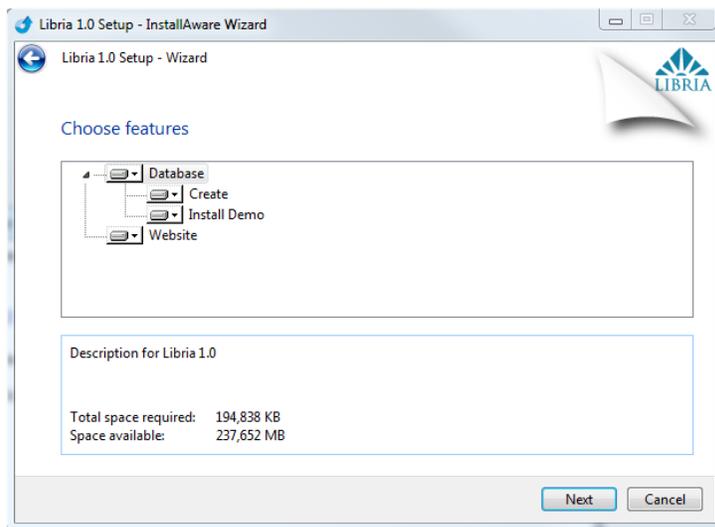


4. Click Next.

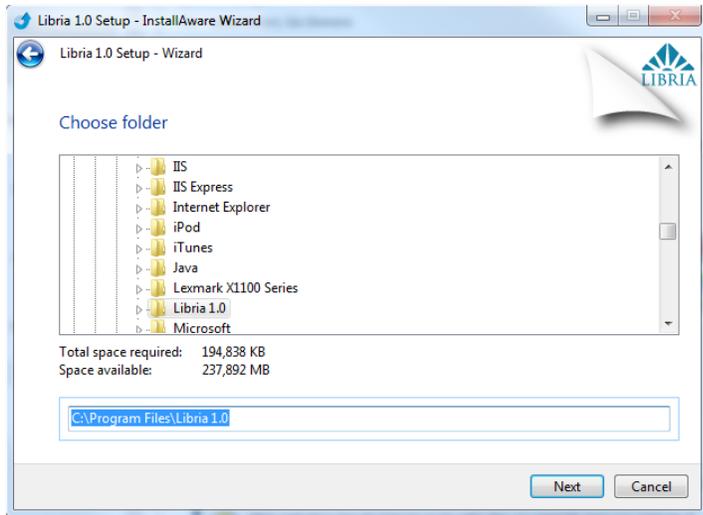


5. Select which features are to be installed:

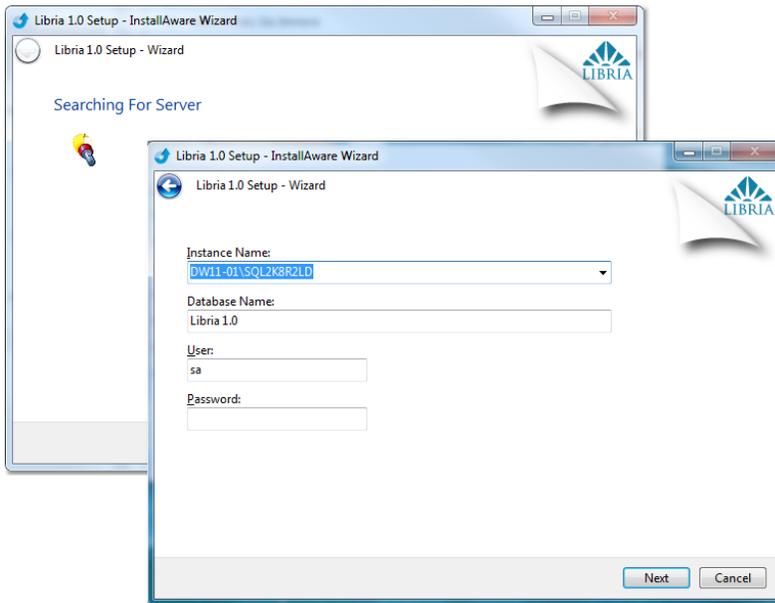
- **All Features** will install the website, database and an organization with a demo request type.
- **Some Features** allows you to choose to install the database, and or the demo, along with the website.
- **Least required features** – installs the website only.



6. Click Next.



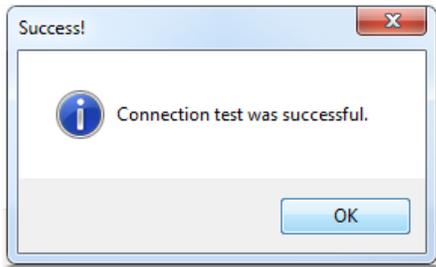
7. Select the directory location where the application is to be installed.
8. Click Next.



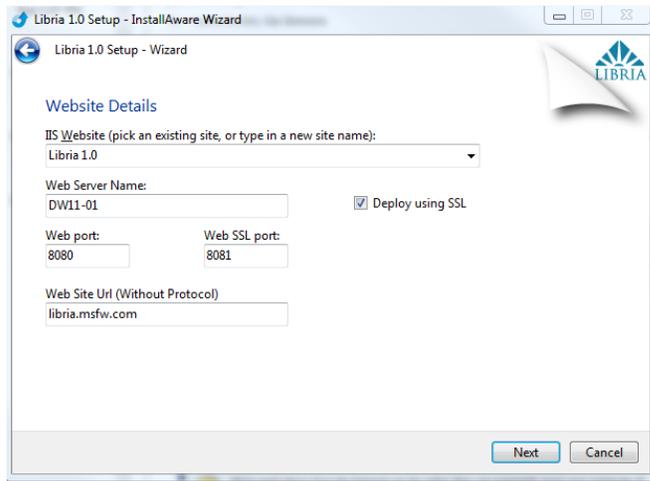
9. Enter info
 - a. Database Instance Name
 - b. Database Name: preferably one without spaces
 - c. User ID: typically a sysadmin user that has create database rights
 - d. Password

Note: You can add an SQL application user with owner rights later and edit the web.config file to change the SQL user.

10. Click Next.



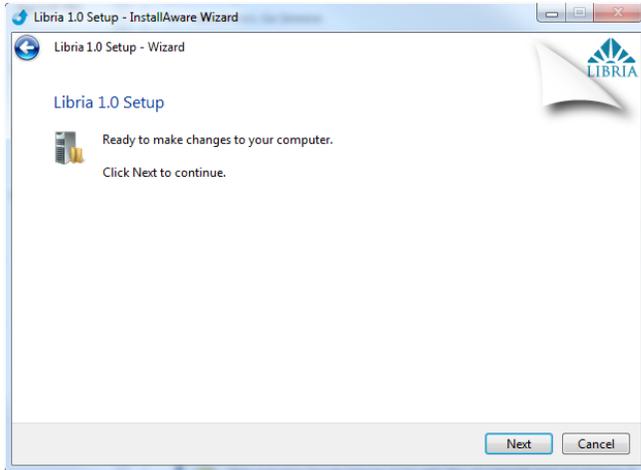
11. If the connection was successful, a success dialog opens, click OK.



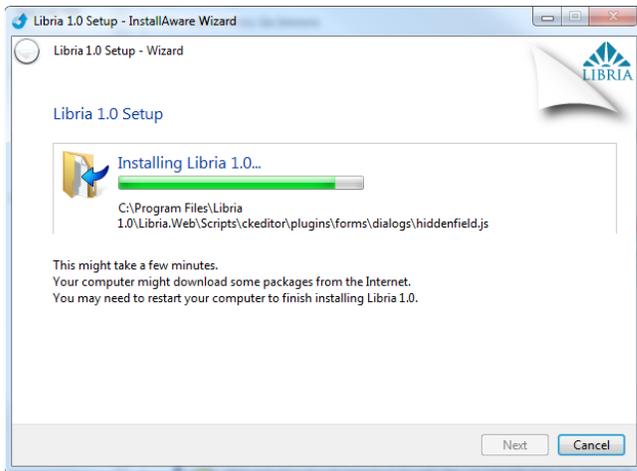
12. On Website Details:

- Enter the IIS Website name
- Web Server Name
- If using SSL, place a checkmark in Deploy using SSL
NOTE: our click-once Scan Client requires SSL
- Web Port number
- Web SSL port
- Web Site URL (e.g. Libria.msfw.com)
NOTE: this will need to be entered into your DNS

13. Click Next.

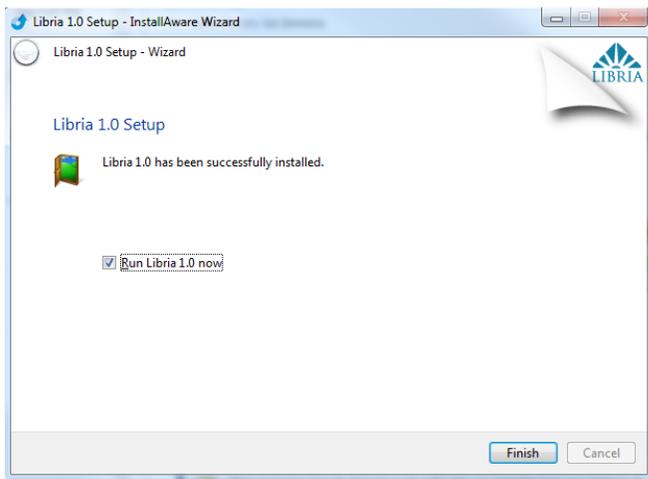


14. Ready to make changes window, Click Next.



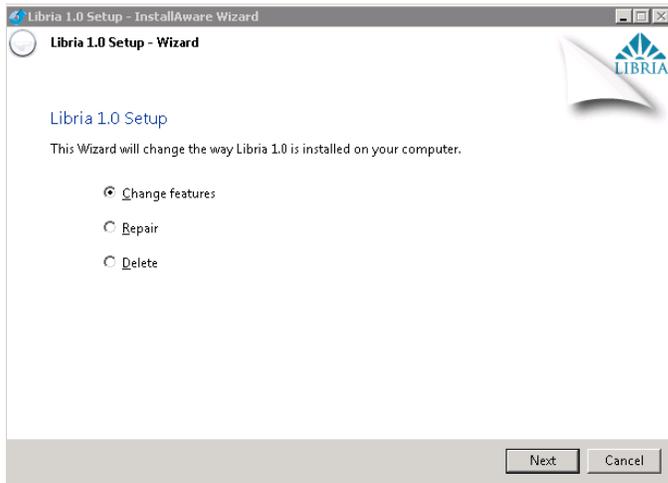
15. A window showing the status of the install opens.

16. When the install has completed, a successful dialog is shown.

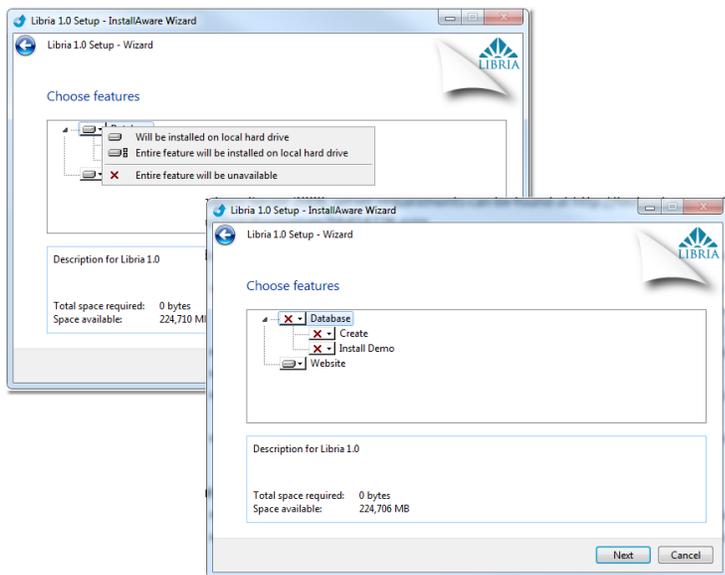


17. Click Finish.

Install Libria – Upgrade to new version



To upgrade to a new version of Libria pick the **Change Features** radio button. Change the Database to “Entire feature will be unavailable”. This will upgrade your install to the latest version without changing any of your configurations.



Helpful Tips

Deleting Request Types

Draft Request Types can be deleted but will need to be deleted in the individual pieces. It would work best to have the parts deleted in the reverse order in which they were added. In order to protect the integrity of the database, you are not allowed to delete a Request Type once it has

been published. If the Request Type is no longer wanted, select Mark Inactive on the Edit Request screen.

Browsers:

- Popups need to be allowed for the URL.

A template letter, such as Denial Letter, is created as a pdf file. In order to view the pdf, a modification may need to be made to your browser settings.

Google Chrome:

Viewing PDF's

- In Google Chrome's address bar, type `chrome://plugins/`.
- Disable Chrome PDF Viewer and enable Adobe Reader.
- Update Adobe Reader plugin if necessary.
- Right click on the URL's padlock.
- On the Permissions tab set Popups "Always allow on this site".

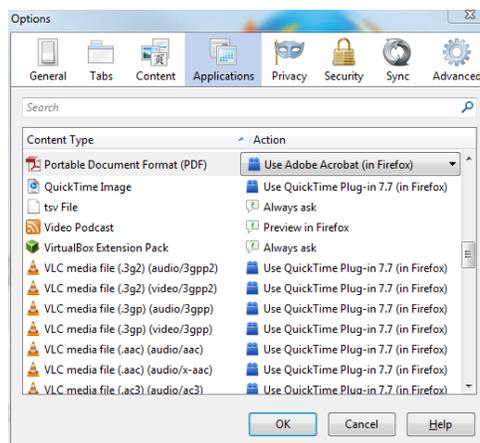
Printing PDF's

- Print button, which is only available in IE, is not available on an embedded pdf in Chrome. Hover over the PDF viewer (body of the page) to select the print icon.

Firefox:

Viewing PDF's

- Open Firefox Options.
- Select Application.
- Select Portable Document Format (PDF).
- Set the dropdown value to Use Adobe Acrobat (in Firefox).
- Click OK.



Printing PDF's

- Print button, which is only available in IE, is not available on an embedded pdf in Firefox. Hover over the PDF viewer (body of the page) to select the print icon.

Step Titles:

- Steps that have been completed are titled “Completed Step: %Step%” when you open the step.
- The first non-completed step is titled “Current Step: %Step%”.

Native File Type Support

- Convert to images for redaction: .doc, .docx, .xls, .xlsx, .rtf, .txt, .pdf
- Image types: .jpg, .tif, .png, .bmp
- Stored and available to forward: e.g. .avi, .zip, .wav