

**Calytera**

# amanda<sup>TM</sup> editions

Freedom of Information

[calytera.com](http://calytera.com)

amanda™ FOI editions

# Enterprise platform for smarter government

Calytera has more than 25 years of expertise helping governments modernize, increase engagement with citizens and drive economic growth. We are a 2018 GovTech 100 company, a 2018 CIOReview “Top 20 Most Promising Public Sector Solution Provider” and founder of Amanda, the leading software platform for digital government.



**Amanda helps governments of all sizes digitize and automate critical business functions.**

**It is a secure, enterprise platform that can be configured to meet your specific business needs and can be deployed on-premises or in the cloud.**

The Amanda FOI enterprise platform enables government agencies to optimize and successfully operate their information disclosure process and comply with Access to Information and Privacy legislation. It is a secure platform with integrated document conversion, OCR and redaction that automates the content assembly and capture process, enables users to easily redact sensitive information and provides advanced analytics and reporting to help agencies optimize their program and meet annual compliance reporting requirements.

Amanda FOI digitizes the entire lifecycle of a FOI request including request intake and management, correspondence, document management, consultations, review and redaction and fee calculations and payment.

# Benefits



## Improved Citizen Services

Securely supports multi-channel service delivery (e.g., online, mobile) and enables citizens to easily submit requests for information, check the status of their request and receive requested information electronically.



## Improved Efficiency

Increases productivity by digitizing and automating business processes and reducing or eliminating manual processes and the use of paper.



## Security and Privacy Protection

Amanda secures data access to authorized employees with audit trails and variable access rights across departments.



## Reduced Costs

Helps you reduce costs by eliminating expensive legacy applications and improving operational efficiencies.

# Benefits



## Manage Request Timelines

Accurately manage the timeline of each request and easily track deadlines.



## Embedded Redaction

Integrated and comprehensive redaction solution includes Industry-leading sever, annotation and legal compliance capabilities.



## Advanced Analytics and Reporting

Full integration between case management and redaction helps meet annual reporting compliance requirements.



## Improved Collaboration

Receive input, recommendations on documents and notification of tasks in real-time and eliminate the wasted time associated with sharing paper and electronic documents.

# Two editions designed to fit your needs

Amanda FOI is offered in two feature-rich editions to help governments deliver outstanding public information request services to their citizens.



amanda™ FOI

# Standard Edition

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The Standard Edition includes advanced case management and reporting features designed to help governments successfully operate their freedom of information and privacy protection programs. It enables governments to efficiently manage all stages of a public request for information including request intake, correspondence, document management, fee calculations and payments.

## FEATURES

- Intuitive, browser-based user interface
- Configure and automate business workflows
- Search and sever classified information within responsive documents
- Generate performance reports at the individual and team level
- Manage FOI request corrections, complaints and court events



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# Enterprise Edition

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The Enterprise Edition includes all Standard Edition features and adds support for governments with multiple departments that need access to the system. It enables governments to vary levels of system access by department and includes the My Office dashboard to provide users with quick access to their most important features and information.

## FEATURES

- Includes all Standard Edition features
- Easily integrate with existing systems using web services
- Provide users with single sign-on
- Integration with Microsoft Outlook
- Collaboration Portal available as an add-on

# Features

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# Overview

	Standard	Enterprise		Standard	Enterprise
FOI Redaction	●	●	User and Time Stamps	●	●
Case Management (Information Access Requests)	●	●	Accessibility Standards	●	●
Corrections (Corrections to Personal Information Requests)	●	●	Multi-browser Support	●	●
Complaints (Incident Management)	●	●	Responsive Layout	●	●
Court Events	●	●	Touch-enabled Interface	●	●
Fees	●	●	Application-level Personalization	●	●
General Ledgers	●	●	Localization	●	●
Invoicing	●	●	My Office		●
Payment	●	●	User-level Personalization	●	●
Calendar Integration		●	Search (Data explorer plus simple and advanced searches)	●	●
EAI 5 Connector Pack		●	Business Rules Engine	●	●
EDMS Adaptor		●	Milestone Monitor		●
Outlook Email Adaptor		●	Milestone View		●
Web Services		●	Notifications and Reminders	●	●
Custom Reports	●	●	Task Automation		●
Standard Reports	●	●	Tasklists and Calendar	●	●
Amanda Analytics	●	●	Teams and Assignments	●	●
Merge Documents	●	●	Time and Activity Tracking		●
Email Notifications	●	●	Workflow Automation	●	●
Attachments	●	●	Advanced Data Form		●
Comprehensive Audit History		●	Custom Field Creator	●	●
Single Sign-on (Enterprise Authentication Adaptor)		●	People Master Data	●	●
Roles-based Permissions	●	●	Property Master Data		●
Multi-agency Permissions (Row Level Security)	●	●	Asset Master Data		●

amanda™ FOI editions *features*

# FOI Redaction

Amanda FOI Redaction is an integrated redaction solution that enables agencies to review and securely redact sensitive information from electronic documents. It includes industry-leading sever, annotation and legal compliance capabilities and it permanently removes sensitive information using a sophisticated “burn-in” technique and provides role-based access control (RBAC) to securely manage user privileges.

Amanda FOI Redaction includes advanced tracking and reporting capabilities. It creates a detailed audit log that captures every user action against a file and maintains the status of every image, redaction, page and request.

## Highlights

- Import documents and convert to encrypted PDFs
- Automated OCR scan and page deskew
- Direct multi-document scanning into secure storage
- Metadata indexing at the document level and page level (e.g., subject, dates, to, from, author, etc.)
- Search documents by metadata and identify duplicates
- Search document by page content for automatic severing
- Advanced redaction toolset
- Configurable disclosure classification
- Justify redacted information with exemptions management
- Secure permanent redaction with “burn-In”
- Powerful and flexible options for annotation control and document assembly
- Export documents for consultation packages, internal working copies or final release packages
- Create automated redaction reports

Available for Standard and Enterprise Editions



# Request Processing



**Standard Edition**



**Enterprise Edition**

## Case Management (Information Access Requests)

A sophisticated case tracking and reporting solution that provides agencies with a single view into all activities associated with a FOI request and helps automate many of the tasks associated with the information disclosure process. It includes advanced reporting that enables agencies to track activities, timelines, financials and performance at an individual and team level to ensure they continually stay in regulatory compliance. Integrated time management ensures accurate tracking of both request level and task level deadlines at a glance.



## Corrections (Correction to Personal Information Requests)

The Corrections feature enables agencies to easily handle requests from the public to correct their personal information. It enables users to log, track and close correction requests and records the type of correction made, the correction request date, the correction close date and a description of the correction.



# Request Processing



**Standard Edition**



**Enterprise Edition**

## Complaints (Incident Management)

The Complaints feature helps agencies manage complaints (e.g., private information exposed, excessive fees, excessive amount of time to complete request, disagreement about withheld documents) about a specific information or privacy request. It links the complaint to the appropriate FOI request and tracks all activity associated with the complaint including the investigator assigned, the reason for the complaint, the complaint description, the data received, the date closed, the findings and the result of the investigation. A complaint can be linked to multiple requests or a request can contain multiple complaints.



## Court Events

The Court Events feature enables agencies to log and track court events that involve a FOI request. It links the court event to the associated FOI request and logs the justice file number, name and phone number, the date filed in court, the date the FOI/ATIP office was advised and comments associated with the case. Court events can be linked to multiple requests or a request can contain multiple court events.



# User Experience



**Standard  
Edition**



**Enterprise  
Edition**

## Accessibility Standards

Amanda is in compliance with the U.S. Federal Government Section 508 and meets the W3C WCAG 2.0 level A and AA guidelines.



## Multi-browser Support

Browser agnostic user interface supports Chrome, Firefox, Safari, Internet Explorer and Microsoft Edge.



## Responsive Layout

A responsive design ensures each page renders well on a variety of devices and screen sizes.



## Touch-enabled Interface

Features an interface designed to work with touch-enabled devices (e.g., Apple iPad, Microsoft Surface).



# User Experience



**Standard Edition**



**Enterprise Edition**

## Application-level Personalization

Enables administrators to personalize the user interface for all users or a given department.



## Localization

Enable users and the public to view information in their desired language by adding secondary language descriptions for all fields and messages.



## My Office

Users can create personalized dashboards to gain quick access to the most important features and information.



## User-level Personalization

Enables individual users to personalize their homepage, toolbar, views, etc.



# User Experience



**Standard  
Edition**



**Enterprise  
Edition**

## Search (Data Explorer and Simple & Advanced Search)

Advanced search capabilities enable users to save and share searches, specify a search for any data field and view search results in list, tile or map view.



# Workflow & Data Management



**Standard Edition**



**Enterprise Edition**

## Business Rules Engine

Enables administrators to write business rules to validate data entered by users and to automate data updates for each workflow.



## Milestone Monitor

Monitors the time associated with each step in a workflow (e.g., tracks all time associated with a given task showing active and wait time for an agency).



## Milestone View

Provides a Gantt chart view of your project and associated milestones.



## Notifications and Reminders

Set up automated notifications and reminders to alert individuals of a new task, pending due date of a review, consultation or retrieval task.





# Workflow & Data Management



**Standard Edition**



**Enterprise Edition**

## Task Automation

Automate repeatable tasks including generation of reports, renewals and updates to third party systems.

—



## Tasklists and Calendar

Tasks and meetings scheduled in Amanda are synched with and can be viewed in Microsoft Outlook.



## Teams and Assignments

The ability to define “teams” within your agency and assign specific tasks to individuals or teams (e.g., teams designated for each program area).



## Time and Activity Tracking

Automatically record and track the time spent by each user on each task. Includes the ability to track actions outside of Amanda such as vacations, holidays and training time.

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# Workflow & Data Management



**Standard Edition**



**Enterprise Edition**

## Workflow Automation

Administrators can define a unique workflow for each case type; this includes the ability to schedule and assign tasks and define a checklist, fees and other data fields for each task.



## Advanced Data Form

Ability for administrators to create new data entry screens for intensive data capture needs (e.g., define custom forms for informal processing, investigations, miscellaneous internal-only data).



## Custom Field Creator

Create custom data fields to configure, capture, track, validate and manage any data required as part of a process (e.g., create new fields for data required in a request for waiver, express priority, etc.).



## People Master Data

Provides a single source of truth (master data structure) for each customer (person or organization).



amanda™ FOI editions *features*

# Workflow & Data Management



**Standard Edition**



**Enterprise Edition**

## Property Master Data

Provides structured data typically associated with properties or organization locations for storing address, GIS and building details.

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## Asset Master Data

Provides a single source of truth (master data structure) for assets (e.g., physical media assets held by your department (e.g., books, film, etc.)).

—



# Financial Management



**Standard Edition**



**Enterprise Edition**

## Fees

Set up an unlimited number and type of fees.



## General Ledgers

Enables administrators to define general ledgers and codes and route revenue into the appropriate accounts.



## Invoicing

Generate an invoice for a fee payment and create batches to run scheduled updates, creating and sending invoices based upon user-defined parameters of the batch.



## Payment

Accept multiple payment methods for the payment of fees including credit card, auto pay, ACH and electronic checks.



# Integration



**Standard Edition**



**Enterprise Edition**

## Calendar Integration

Fully integrate with the Microsoft Outlook calendaring system. Appointments scheduled in Amanda (e.g., an internal working copy review) will be created in the appropriate analyst's Outlook calendar.

—



## EAI 5 Connector Pack

Creates an interface for Amanda to push data out to five external systems (e.g., financial systems, CRM); includes a logging capability to track all interactions.

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## EDMS Adaptor

Store and retrieve documents from external document repositories. Support real-time interface between EDMS and Amanda. Retrieve, view and print documents from the EDMS.

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## Outlook Email Adaptor

Integrate Microsoft Outlook 2010 mail with Amanda and enables users to send email messages from Outlook to Amanda as folder attachments (requires an EAI connector).

—



amanda™ FOI editions *features*

# Integration



**Standard  
Edition**



**Enterprise  
Edition**

## Web Services

An API that enables external systems to connect to Amanda.



# Reporting



**Standard  
Edition**



**Enterprise  
Edition**

## Custom Reports

Create custom reports using Crystal Reports, Jasper Reports and Oracle BI Publisher.



## Standard Reports

A standard suite of reports for categories including performance, request timelines, annual regulatory reports, document review and request summary.



## Amanda Analytics

Amanda users can easily develop their own dashboards, reports and other data extracts using an integrated Yellowfin business intelligence reporting platform.



# Correspondence



**Standard  
Edition**



**Enterprise  
Edition**

## Merge Documents

Dynamically pull information (e.g., name, address, request number, etc.) from the Amanda database into document templates (e.g., letters, forms, notices) created in Microsoft Word.



## Email Notifications

Automates the notification of users or clients when there is a pending due date or outstanding process that needs attention.



## Attachments

Users and clients can upload attachments (e.g., MS Office document, PDF, images, videos, audio files, etc.) to a record in Amanda.





# Security



**Standard Edition**



**Enterprise Edition**

## Comprehensive Audit History

Tracks every transaction executed within the system including the user, date, time and before & after images of the data modified.

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## Single Sign-on (Enterprise Authentication Adaptor)

Enable users to authenticate in Amanda using single sign-on (Kerberos protocol or Active Directory/LDAP authentication).

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## Roles-based Permissions

Manage permissions by individual, role and/or user group.



## Multi-agency Permissions (Row Level Security)

Control read/write access permission to data at the user level to enable multiple departments to use the same database (all departments use the same data, but individual users only have access to data that is pertinent to their department or function).



# Security



**Standard  
Edition**



**Enterprise  
Edition**

## User and Time Stamps

All activities in Amanda are logged with information about the specific user, action taken and time stamp.





# Add-on Features

These features can be added to Amanda FOI Editions

## Collaboration Portal

The Collaboration Portal is a browser-based application that enables external users (other agencies, program areas, office of primary interest, etc.) to review, retrieve and provide recommendations on case files without giving them access to the entire Amanda back-office application. It allows users to view only the case files and related information that has been assigned to them and provides them with the ability to complete a requested action or set of actions (e.g., retrieve documents, provide fee estimates, approve, review, comment, etc.) for a specific request.



Available for  
**Enterprise Edition**

## Requestor Portal

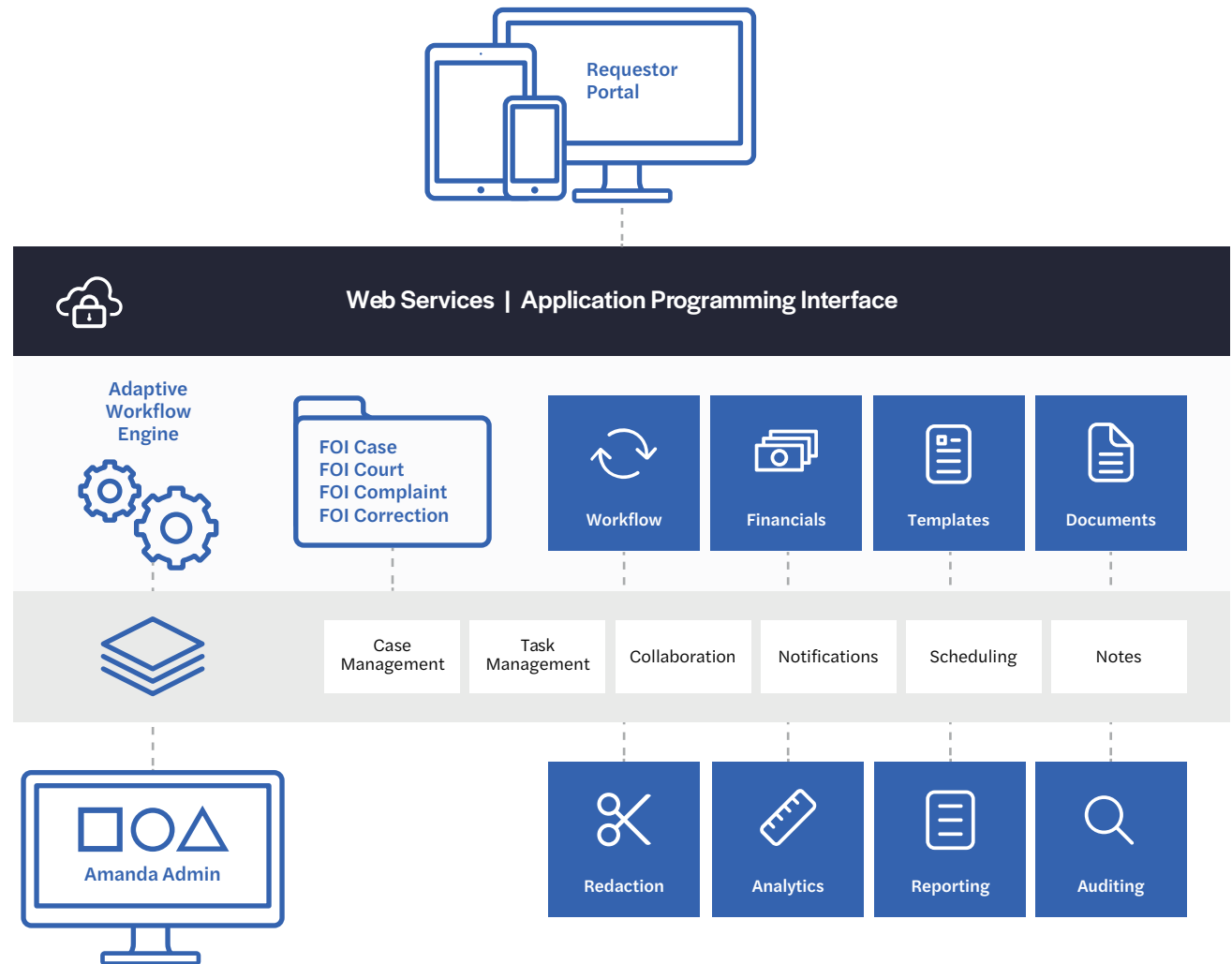
The Requestor Portal is a commercial-off-the-shelf portal solution that enables citizens to manage an information request online. This includes submitting a public information request, checking the status of a request, uploading and downloading attachments and making a payment. The portal has a modern, intuitive design and enables agencies to completely configure the submission form with desired fields, drop-downs and text boxes.



Available for  
**Standard & Enterprise Editions**

## Amanda architecture overview

Amanda offers the most flexible workflow engine for government and it serves as the master data source (single source of information) across departments.



# If you're considering Amanda™ or just want more information, we're here to help.



## Schedule a demo today

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