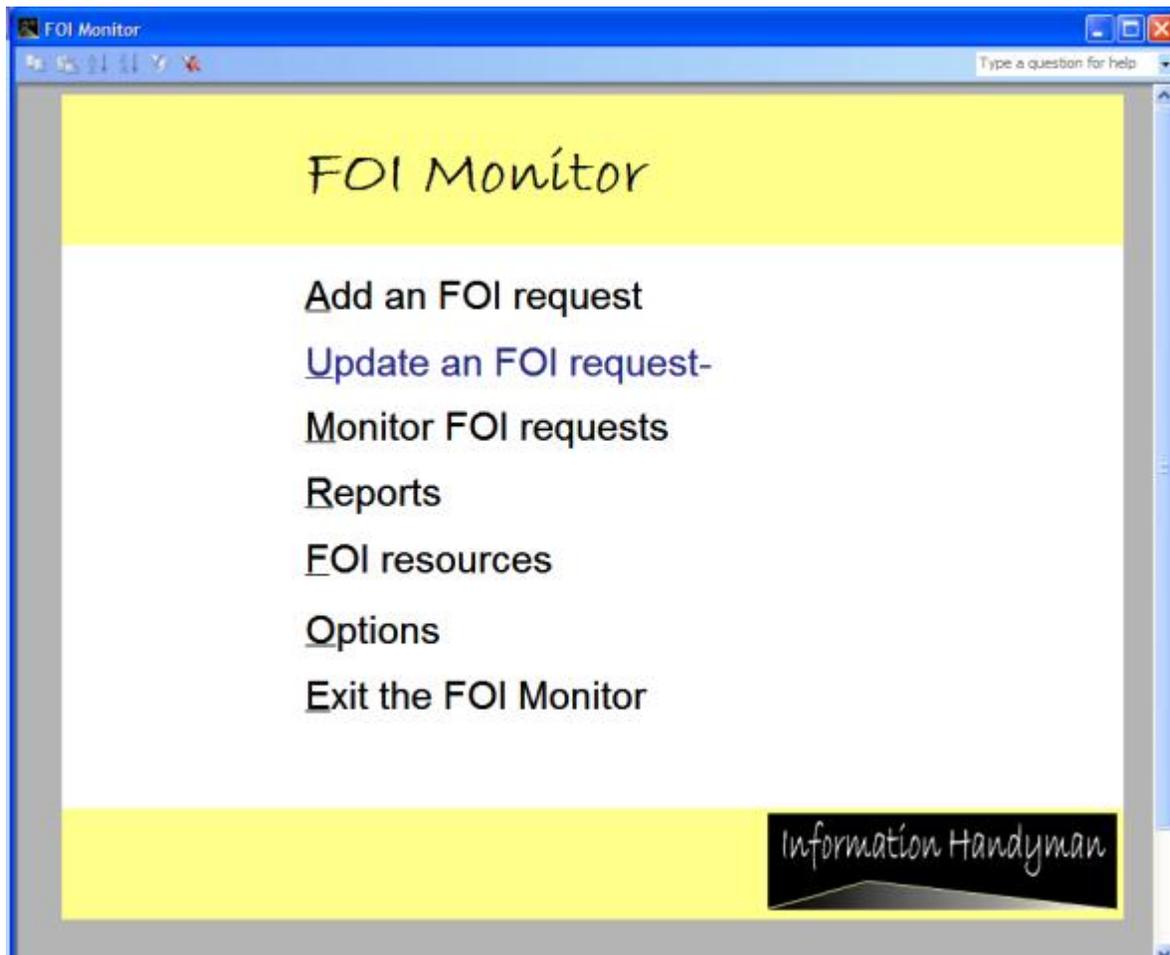


HowTo: Putting the FOI Monitor into action

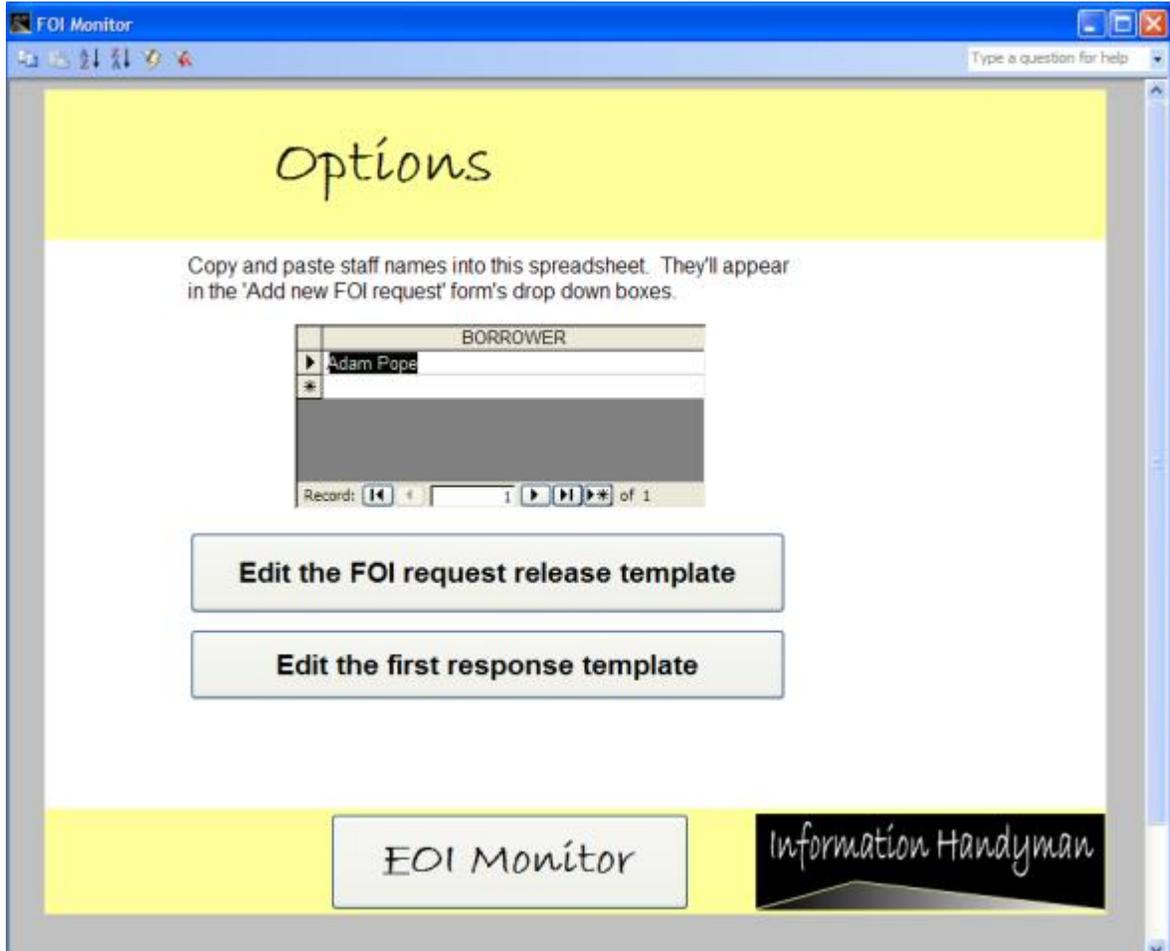
Initially you'll need to download and install the FOI Monitor. Then double-click on the icon it's inserted on your desktop, or the 'MDE' file in the 'FOI Monitor' folder and the following screen ought to appear:



If you find Access is confronting you with numerous security messages, you'll need to open up Access and create a new, blank database. Then go Tools/Macros/Security and choose the 'Low security' level. If your organisation is running appropriate virus scanning software you ought not to be concerned about this - as is mentioned beside the 'Low security' setting within Access.

Once that's done you need to edit the tables within the FOI Monitor to reflect staff in your organisation and the letter templates. You'll need a staff list to paste into the FOI Monitor table - perhaps sourced from an Outlook list exported to a spreadsheet, and your images logo for the letter templates.

Click on the 'Options' link, and this page ought to appear:



Delete 'Adam Pope' from the table, then copy and paste a staff list from your organisation into the table.

Next click on 'Edit the FOI request release template'. This will bring up a word document that has been used to good effect in the past. Edit this as you see fit, adding your organisation's logos wherever you think best. Do the same with the 'First response template' and then you're ready to start inputting any access to information requests you may have received.

Whenever a new FOI request is received by your organisation, from the main FOI Monitor page click on 'Add an FOI request'. The following form will appear:

The screenshot shows a web browser window titled 'FOI Monitor'. The main heading is 'Enter a new FOI request'. The form contains the following fields and controls:

- Received:** 28/08/2006
- Due:** 24/09/2006
- Type of request:** FOI (dropdown)
- Received by:** (dropdown)
- Query:** (text area)
- First response sent:** 28/08/2006
- Template:** (button)
- Currently with:** (dropdown)
- Status:** (dropdown)
- Email/file folder:** (text field)
- Requestor:** (dropdown)
- Street:** (text field)
- Suburb:** (text field)
- City:** (dropdown)
- Country:** UK (dropdown)
- Postcode:** (text field)
- Phone Number:** 0 (text field)
- Email:** (text field)
- Organisation:** (dropdown)
- Client keyword:** (dropdown)
- File reference:** (text field)

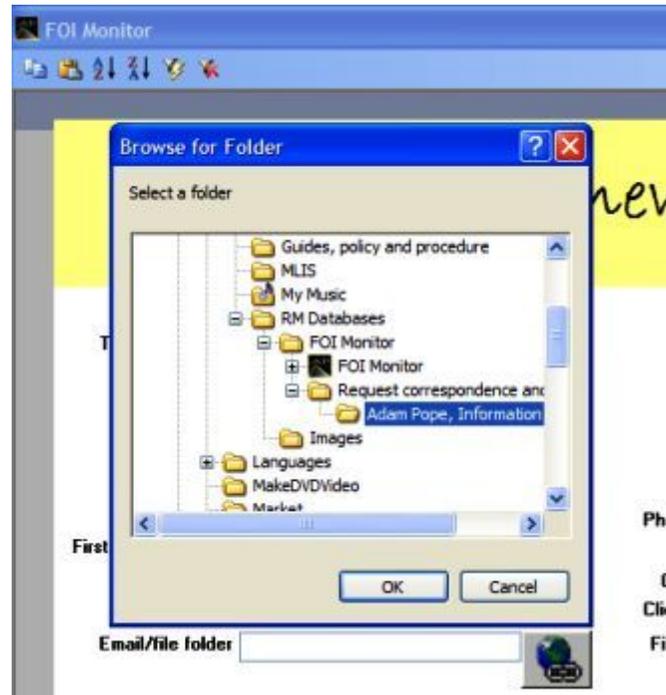
At the bottom, there is a 'Notes:' text area and a navigation bar with buttons for 'Monitor requests', 'FOI Monitor', 'Exit', and 'Information Handyman'.

The date due will default to 20 working days from the 'Received' field. You can then choose FOI, DPA, or EIR depending on the type of request you've received. Choose the staff member who received it from the drop-down box, then paste the request into the 'query' field. Click on the 'Template' button, and send the requestor an email/letter indicating you've received the request and are dealing with it.

'Currently with' is another drop-down box of staff, and if you're using MS Outlook the FOI Monitor will generate an email to that person 3 days before the request is due. The email will be generated when the FOI Monitor is opened, and will be sent from the Outlook account of the person who opened it. This email can be stopped by changing the status (the next field) to indicate the request has been dealt with.

The next field allows you to link to a folder containing any correspondence or files relating to the request. First you'll have to create such a folder, and using

Windows Explorer is perhaps the best way to do this. Right click on the 'Start' button, and click 'Explore'. Then browse to the FOI area on your shared drive, create a folder called 'Request correspondence and files' then a further folder with the requestor's name. Head back to the FOI Monitor and click on the hyperlink button. The following pop-up box will appear:



Browse to the folder you've just created, and select it. Next time you're tracking the request, you can just click on the link you have just created and the folder will open.

Finally, enter all the requestor's contact details into the fields on the right hand side of the form. You'll then have to busy yourself with preparing an answer to the request. Once that's done, head over to the FOI Monitor main page and click on 'Monitor FOI Requests'.

The following form appears:

The screenshot shows a web browser window titled "FOI Monitor". The main content area has a yellow background with the heading "FOI Request Summary" in a handwritten font. Below the heading is a table with the following data:

Received	Requestor	Type of request	Currently with	Status	
28/08/2006		FOI	Jack Citizen	Complete response se	Update this request
28/08/2006	Information Handyman	FOI	Adam Pope	Assigned	Update this request

At the bottom of the page, there is a navigation bar with a search box containing "EOI Monitor", several navigation buttons (back, forward, search), an "Exit" button, and a black banner with the text "Information Handyman" in white.

From here you can view the requests, ordering them by date, type, date received, staff member and status. If you'd like to amend any of the details in one, apply any exemptions or add details of an appeal, click on the 'Update this request' button.

The following form will appear:

The screenshot shows a web browser window titled 'FOI Monitor' with a search bar at the top right. The main content area has a yellow background with the text 'update an FOI request' written in a handwritten font. Below this is a form with various fields and buttons. The form is organized into several sections:

- Received:** 28/08/2006
- Type of request:** FOI
- Received by:** Adam Pope
- Query:** Does your organisation use the FOI Monitor?
- 1st response sent:** 28/08/2006
- Currently with:** Adam Pope
- Email/File folder:** C:\Documents and Settings\...
- Requestor:** Information Handyman
- Street:** Boguse Address
- Suburb:** Boguse Address
- City:** Glasgow
- Country:** UK
- Postcode:**
- Email:** adam@adanpope.net
- Organisation:** Information Handyman
- Status:** Assigned
- Client keyword:**
- File reference:**
- Photocopying costs:** Paid:
- Postage costs:**
- Labour costs:**
- Completed:**
- Verified:**
- Signed off:**
- Date completed:** 27/08/2006
- Due:** 24/09/2006

Below these fields are five exemption sections, each with a dropdown menu and a 'Public interest test' button:

- Exemption 1: Defence
- Exemption 2: National security
- Exemption 3:
- Exemption 4:
- Exemption 5:

There are also buttons for 'Release template' and 'Click here if request appealed'. At the bottom, there are navigation buttons (back, forward, search) and a footer area with buttons for 'Monitor requests', 'FOI Monitor', 'Exit', and 'Information Handyman'.

This form allows you to update the record you've selected. You can also access this form from the main FOI Monitor page by clicking on the 'Update FOI request' link and use the navigation keys at middle bottom to find a specific request.

All the fields can be amended, but there are a few new ones compared to the first 'Add an FOI request' form. You can apply up to five exemptions to a request using the 'Exemption X' fields.

The drop down boxes beside each field list those that are available, and if you choose a qualified exemption, that requires application of the public interest test, the following form appears:

The screenshot shows a web browser window titled 'FOI Monitor'. The main heading is 'Public interest test'. Below this, there is a text input field for 'Exemption:' with the word 'Defence' entered. The next question is 'How would the public interest best be served by withholding the information?' followed by a large empty text box. Below that, the question is 'Would the public interest be served where access to the information would:'. There are four sub-questions, each with a 'Yes' dropdown menu:

- Further the understanding of, and participation in, debate of issues of the day
- Facilitate the accountability and transparency of public authorities for decisions taken by them
- Facilitate accountability and transparency in the spending of public money
- Allow individuals to understand decisions made by public authorities affecting their lives and, in some cases, assist individuals in challenging those decisions

At the bottom, there is a text input field for 'State how the balance works in favour of disclosing or withholding the information:'. Below the form are two buttons: 'Go back to the request' and 'Information Handyman'.

Fill out the displayed fields to show you've considered this in your deliberations, and prove to any appeals authority the steps you took to arrive at the exemption.

If the request is appealed in future, by the requestor, the ICO or the Information Tribunal, click on the 'Appealed' button on the 'Update an FOI request' form to log the results of any decisions.

Over time, you may wish to find out how well you are faring in answering your FOI requests. Head to the 'Reports' page from the main 'FOI Monitor' form. From there you can access statistics and figures about how much money you've charged in fees, how often you've used each exemption, the average number of days it has taken to respond to requests and so on. The extensive data produced by the reports is based on the Department of Constitutional Affairs' central monitoring reporting requirements.

There's also a 'Resources' form with links to useful FOI practitioner advice, the legislation, best practice and so on. Good luck with using the FOI Monitor, if you need any help don't hesitate to get in contact with the Information Handyman on: adam@adampope.net