



G-Cloud 15

Dynamics 365 based Public Engagement Manager

Service Definition

Service Overview

Ceox's Microsoft Dynamics 365 Public Engagement Manager enables Public Sector Organisations to administer enquiries and official correspondence management. Manage cases: Freedom of Information (FOI) requests, Inter-Ministerial (IM), Complaints, Data Access Requests, Environmental Information Regulation (EIR) requests, Parliamentary Questions (PQ), Subject Access Requests (SAR), Ministerial Correspondence (MC), Treat Official, Write-Rounds, Invitations.

Using Microsoft's Power Platform as the foundation, Ceox's Public Engagement Manager (PEM) offers a comprehensive solution for Case and Correspondence Management for Central and Local Government organisations.

PEM includes all the features needed for efficient correspondence management:

- **Common Case Types** – All the different types of Cases used across Local and Central Government are supported by PEM:
 - FOIs and EIRs, including Internal Review and ICO Appeals
 - SARs – covering all SAR types
 - Enquiries and Complaints
 - General Correspondence
- **Central Government Case Types** – Comprehensive coverage of the different types of cases that Government Departments need to manage:
 - Parliamentary Questions – Including automated import from the UK Parliament system
 - Ministerial Correspondence – From MPs, Peers, organisations, and members of the public
 - Treat Official, including delegated responsibility
 - Invitations – To events, meetings, speaking opportunities, etc.
 - Incoming and Outgoing Write-Rounds – Managing communications with other Government Departments from initial emails through to conclusion
- **Power BI** – Providing management dashboards and specific reports.
- **Security** – Managing the visibility of Cases and their related documents, by Case Type, Case Status, and User Type/Role.

Configurable Case Types – PEM is highly configurable. And where needed, existing case types can be modified to conform to current working practices. New custom case types can also be added, including the associated workflows.

Intelligent Automation – AI can assist in a number of areas in PEM. It can summarise cases, notes, and emails by default.

Optional AI Additions – Additional AI options are available, including:

- Automatic conversion of emails for specific mailboxes to cases
- Automated extraction of case details from the original correspondence
- AI summaries of cases
- Draft response generation

Integration – PEM integrates with the UK Parliament system for Parliamentary Questions and has native integration with Outlook, Word, Excel, and SharePoint for document management.

Familiar User Experience – PEM is built on top of Microsoft's Power Platform and as well as integrating with Office applications, PEM's user interface is consistent with Microsoft's standard approach. So, Users will be familiar with the layout and usage of PEM.

Minister / Executive App – Ministers and Senior Executives can approve (or reject) responses drafted by officials using a highly focused app geared to their decision-making processes.

Extensibility – PEM, being built on Microsoft's Power Platform, provides the ideal platform for extending its functionality to support unique business needs. We can also work in collaboration with your internal team on enhancements.



Our Features

Our Public Engagement Manager service includes:

Service Option	PEM
Case Volumes	
Standard Case Volume	Unlimited
Maximum Case Volume	Not needed
Bolt-On Case Volume Packs	Not needed
Case Types	
Common Case Types	
FOI, EIR and Appeals	✓
SAR	✓
Data Protection Request	✓
Enquiries and Complaints	✓
Correspondence	✓
Non-complaints	✓
Compliments	✓
Data Breaches	✓
Government Departments and Agencies	
Parliamentary Questions	✓
Treat Official	✓
Ministerial Correspondence	✓
Invitation	✓
Incoming Write-Rounds	✓

Outgoing Write-Rounds	✓
Further Features & Services	
Email to Case Conversion	Option
Email Content Extraction	Option
Copilot and Email Summary	✓
AI Case Summary	Option
AI Draft Response Generation	Option
Full two-way API across all Components	✓
Microsoft Word Integration	✓
Microsoft Excel Integration	✓
Microsoft Outlook Integration	✓
Microsoft SharePoint Integration	✓
Redaction	Option
Single Sign-On	✓
Access Management Control for Superusers	✓
Fine Grained Access Control	✓
Development of Additional Case Types	Option
Enhanced Configuration of Existing Case Types	Option
Extensibility	
Low Code Extensibility	✓
Development Code Extensibility	Available, but not normally needed
Joint Ceox / Client Extensibility	Available on discussion after initial go-live
Ceox Only Extensibility	✓

Reporting & Dashboards	
Statutory Reports	✓
System Dashboards	✓
User Configurable Dashboards	✓
Configurable Bulk Download Reports	✓
Power BI	✓

Implementation Options

Options for implementation are available depending on your needs and number of users:

- **Essential** – for organisations only needing PEM to be set up for the standard common Case Types (FOI, SAR, enquiries, and complaints), and their users and teams set up. For this option, it is assumed that new Cases will be managed in PEM, with any pre-existing uncompleted Cases being finished in the previous system, so it is assumed there will be no data migration. Power BI is also excluded from this option. Standard email templates and a single branded document template is included.
- **Advanced** – also for organisations only needing the standard common Case Types, but with an allowance for data migration from spreadsheet exports from the previous system from Ceox provided Excel templates. The standard PEM Power BI reports are included in this option, along with removing any unwanted steps in the standard processes, and customised email header, footer, and style.
- **Pro** – this option includes the Central Government Case Types, and along with all the Advanced options, includes up to 40 days of data migration support for existing cases, contacts, and organisations via spreadsheets. Also included are document templates for each Minister and Case Type.
- **Bespoke** – for larger organisations with complex current processes where PEM needs to be customised to support the current processes. Bespoke migration from the current system and custom integration can also be included.

	Essential	Advanced	Pro	Bespoke
Case Types				
Common Case Types (FOI, SAR, etc.)	✓	✓	✓	✓
Central Government Case Types (PQ, MC, etc.)		✓	✓	✓
Configuration of standard options for Case Types		✓	✓	✓
Customisation of Case Types to current business processes where desired				✓
Templates				
Standard email templates	✓			
Email templates with customised header, footer, and style		✓	✓	✓
Customised email templates				✓
Single document template with branding	✓	✓		
Document templates for each Minister and Case Type			✓	✓
Reporting				
PEM Dashboards	✓	✓	✓	✓
Power BI reporting	Option	✓	✓	✓
Additional Dashboards and Power BI report	Option	Option	Option	✓
Data Migration				

Data migration from template spreadsheets		Up to 5 person days	Up to 40 person days	✓
Data migration from source to PEM using data mappings				✓
Further data migration support		Option	Option	✓
Go-Live Readiness				
Users and Teams set up from spreadsheet completed by customer	✓	✓	✓	Included. Additional set up available
Training	Online guides	Online guides and 2 person days train-the-trainer	Online guides and 5 person days train-the-trainer	Online guides and bespoke train-the-trainer
Environments				
Environments set up for Development, Test, and Live	✓	✓	✓	✓
SharePoint environments	✓	✓	✓	✓
Power BI environments	Option	✓	✓	✓

Benefits for You

Our Service provides many benefits including:

- Efficient management of all case types from receipt to response.
- Automated creation of cases from defined mailboxes and the UK Parliamentary System, in addition to manual case creation.
- Integrated with Microsoft Office, including Outlook, Excel, and Word; integrated with SharePoint for document management and access control.
- Manages case response deadlines including notifications and alerts, for individual users and across teams.
- User Interface that is modern and responsive, and matches Microsoft's Office suite, ensures users adopt it at a high level.
- Advanced reporting including statutory reports and Power BI reports and dashboards.
- Advanced AI options available leveraging Microsoft's state-of-the-art technology developed in collaboration with OpenAI.
- Secure hosting on Microsoft's UK-based cloud services. Configurable access control to cases and other data.
- Proven high availability across the whole system.
- Rapid development where changes are needed to support customer-specific business processes.
- Highly configurable and flexible to change.
- Advanced automation capabilities.
- ITIL based service management providing support via a service desk.



About Us

We are a certified B-Corp, on a mission to help UK Public Sector organisations use Microsoft technologies to deliver world-class digital services.

We work with Government Departments, Agencies and Public Bodies to drive efficiencies, create engaging citizen services and enable modern digital government.

As a Microsoft Solutions Partner with designations in Business Applications, Data & AI and Digital & App Innovation, we are experts in Agentic AI, Power Platform, Dynamics 365 and the Azure Data Platform. Our team brings extensive public sector experience, from large government departments to mid-size agencies and smaller non-departmental public bodies.

Ceox combines proven technical expertise with an agile, straightforward approach that makes it easy for organisations to use Microsoft technology and deliver world-class digital services.



Cert no: 24565

Our Other Services



Ceox offers a comprehensive suite of services to public sector organisations, all accessible via G-Cloud and other procurement frameworks. Our expertise spans several key areas, each designed to support the delivery of efficient, citizen-centric modern digital government.

Agentic AI

Our Agentic AI services are tailored to enable the transformation of public sector organisations, providing advanced AI agent solutions that drive significant efficiency gains whilst maintaining quality of service and delivering world-class digital services.

Citizen Facing Services

We specialise in building engaging and compliant citizen-facing digital services. Each service is aligned with the Government Digital Service (GDS) Service Standard, ensuring that organisations can deliver world-class public services that are both user-friendly and effective in meeting the needs of citizens.

Business Applications

Ceox designs, builds, and supports best-in-class business applications leveraging the Power Platform and Dynamics 365, focused on improving operational efficiency. We also provide strategic guidance and empower citizen developers to create and manage their own digital tools.

Data & Analytics

We enable organisations to extract valuable insights from their data by utilising the robust suite of data tools available on Microsoft's Azure cloud platform. Our services include the construction of enterprise-grade data warehouses and analytics solutions, allowing organisations to make informed decisions, optimise their operations and deliver world-class digital services.

Our Experience

Our Public Sector experience includes:

Department for Education

- Power Platform Grant Application and Management solution for Connecting Classrooms
- Power Apps Portal for Education Bodies to provide Reinforced Autoclaved Aerated Concrete (RAAC) information for schools

Department for Transport

- Dynamics 365 Public Enquiry Management solution to support the Department's handling of Enquiries and Parliamentary Correspondence
- Development and support for a range of Corporate Power Apps deployed across DfT including Praise Management and Local Recognition, Declaration of Interests and Gifts and Hospitality.
- Power Platform Centre of Excellence provision including training and empowering Citizen Developers.

Department for Energy Security and Net Zero

- Take-on and support of a Dynamics 365 case management system

Foreign, Commonwealth & Development Office

- Intelligent Automation (RPA and AI) for Correspondence Management system using Power Apps and Power Automate
- Design and development of an Agentic AI solution to handle finance and HR queries and processing.

Genomics England

- Take-on and support of a 3rd party developed Dynamics 365 system

Historic Royal Palaces

- Dynamics 365 development and support for marketing campaigns

HM Treasury

- AI Agent for correspondence handling

Homes England

- Delivery of a major funding programme service.
- Architecture and delivery of a Data Platform.
- Supporting in the modernisation of digital and data capabilities

Human Fertilisation & Embryology Authority

- Replacement of a legacy regulatory licence management system into Dynamics 365.
- Build and development of a clinic portal using Power Pages
- Creation of a new data model and migration from existing repositories

Labour Relations Agency

- Development and support of a Power Platform conciliation case management solution
- Data transformation and migration from a legacy platform into the cloud

Legal Ombudsman

- Take-On and support of a 3rd Party Dynamics 365 based case management solution

Solicitors Disciplinary Tribunal

- Dynamics 365 Case Management System to support Tribunals
- Power BI development to provide Management Reporting with dashboards and reports

Transport for London

- Development of a Power App to manage safe access to London Underground stations by contractors and engineers
- Power App development to monitor on-going work and repairs on London Underground Tracks
- Microsoft Dynamics 365 solution with a portal for HGV safety registration
- Road User Charging system with Dynamics 365 and Azure

UK Export Finance

- Development of a Model Driven Power App for case handling including complex calculations and user configuration

UK Research and Innovation

- Power Platform Model Driven Application with SharePoint Integration to manage the bid process and store contractual documentation
- Power Pages solution to gather supplier details and internal Model Driven Application to manage the process of supplier proposals.

Valuation Tribunal Service

- Appeals Management System using Microsoft Dynamics 365
- Power BI Management Reporting solution
- Agentic AI solution for handling evidence submission

Welsh Government

- Leave Booking App in Welsh and English to support cross government leave booking and management
- Power App based solution for managing Permits for Welsh Fisheries
- Delivered a Power Platform Centre of Excellence with training



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Get in Touch

To learn more about Ceox and our services, follow the links below or contact us directly.

<https://ceox.co.uk>

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