



# Leveraging ECM for Mobile Access

## Digital Government in the 21<sup>st</sup> Century

 Cody Bettis 

President of DocuNav Solutions





# ECM Experts



## Laserfiche

- ❑ Pioneer of ECM software solutions
- ❑ 30,000+ worldwide installations
- ❑ More than 5,000 municipalities, including 1/3 of U.S. counties, choose Laserfiche
- ❑ Department of Defense 5015.2 and VERS certified for Records Management





# ECM Experts



## DocuNav

- ❑ Plano, Texas based corporation with 15 years' experience implementing (ECM) software for Texas Government Entities
- ❑ Laserfiche "Top Texas" and "Top 10 Worldwide VAR"
- ❑ Certified Laserfiche Integration and Development Partner
- ❑ Laserfiche Gold Level Certified Technical Support Team
- ❑ Focus on enterprise deployments
- ❑ Authorized DIR Vendor (DIR-SDD-1435)

**Microsoft**  
**GOLD CERTIFIED**  
*Partner*





# Agenda



- ❑ Building a Digital Government
- ❑ The Shifting Landscape
- ❑ The Speed of Information
- ❑ 4 Principal Approaches
  - ▶ Shared Platform
  - ▶ Security and Privacy
  - ▶ Information Centric
  - ▶ Customer Centric





# Building a Digital Government

## Transparent and Transformative



### ❑ Building a 21 Century Digital Government

► May 23, 2012

► Mandates:

4. Establish Intra-Agency Governance to Improve Delivery of Digital Services
  - 4.2 Effective governance structure...
    - to develop and deliver digital services
      - 6 month mandate
5. Shift to an Enterprise-Wide Asset Management and Procurement Mode
  - 5.3 Alternatives analysis of government-wide...
    - contract vehicles for all new mobile-related procurement
      - 12 month mandate
6. Deliver Better Digital Services Using Modern Tools and Technologies
  - 6.3 Ensure all new digital services...
    - follow digital services and customer experience
      - 12 month mandate
7. Administering content lifecycle management
  - 7.1 Engage with customers to identify (at least two) ...
    - existing priority customer-facing services to optimize for mobile use
      - 12 month mandate
  - 7.2 Administering content lifecycle management
    - Identify and optimize two existing priority customer-facing services for mobile use
      - 12 month mandate



# The Shifting Landscape



## □ Present

- ▶ Decommissioning outdated systems
- ▶ Consolidated silos
- ▶ Looking to ECM for fresh start

## □ Future

- ▶ Planning for technological innovation
- ▶ Establishing a framework for agility
- ▶ Respond in real time to needs and trends
- ▶ Structure and propagate consumable information



# Mobile Mandate??



- Utilizing any device,  
...anytime, anywhere
  - ▶ Leveraging central coordination
  - ▶ Amplified web interface
  - ▶ Capturing workflow
  - ▶ Optimizing information searches





# 4 Principal Approaches



- ❑ Shared Platform
- ❑ Security and Privacy
- ❑ Information Centric
- ❑ Customer Centric





# Shared Platform

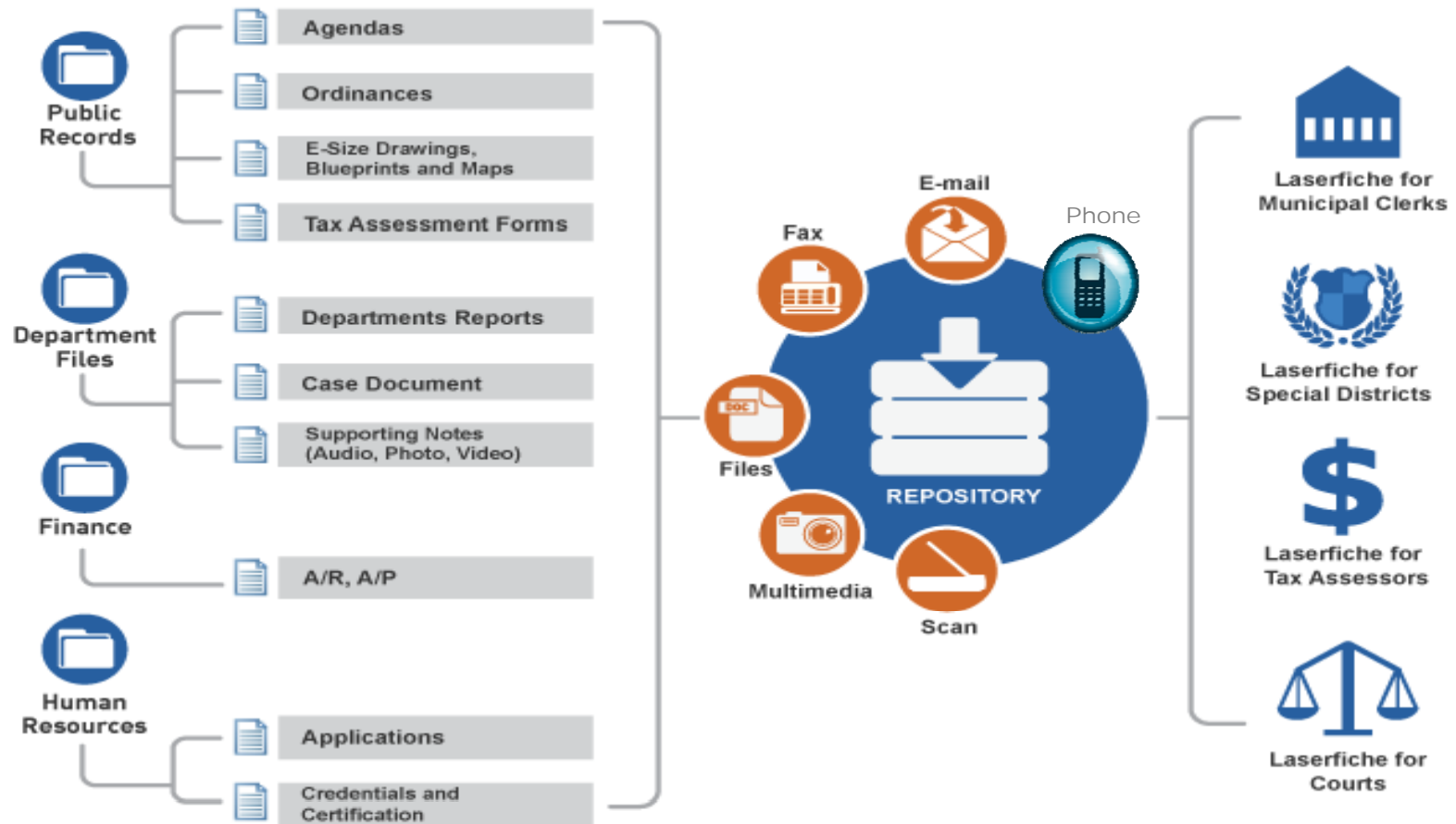


## □ Enterprise Wide Model

- ▶ Sharing resources becomes transparent
- ▶ ECM is middleware that integrates with legacy systems and line-of-business applications
  - » GIS, CRM, ERP and more
- ▶ Access information in the manner and environment with which they are most comfortable
- ▶ Already part of your Private Cloud suite



# Shared Platform





# Security and Privacy



- ❑ Securing data vs. devices
  - ▶ BYOD
  - ▶ Directly connect to ECM for security
    - » Document never resides on the device
  - ▶ Assigning access rights by group vs. individual user
    - » Quickly move users from group to group when their role changes
    - » Easily provide new users with access to the system



# Security and Privacy



## How data is:

### ❑ Collected

- ▶ Record; created, filed, accessible
- ▶ Scan and index their own work
  - » Reduced labor costs
  - » Complete tasks more quickly

### ❑ Used

- ▶ Delivers smarter work processes across all departments
- ▶ Ease of life-cycle compliance

### ❑ Shared

- ▶ Data globally available to:
  - » Store
  - » Retrieve
  - » Share
  - » Utilize

### ❑ Secured

- ▶ Protects citizens' private information from:
  - » Theft
  - » Tampering
  - » unauthorized release





# Lead. Manage. Take Action.



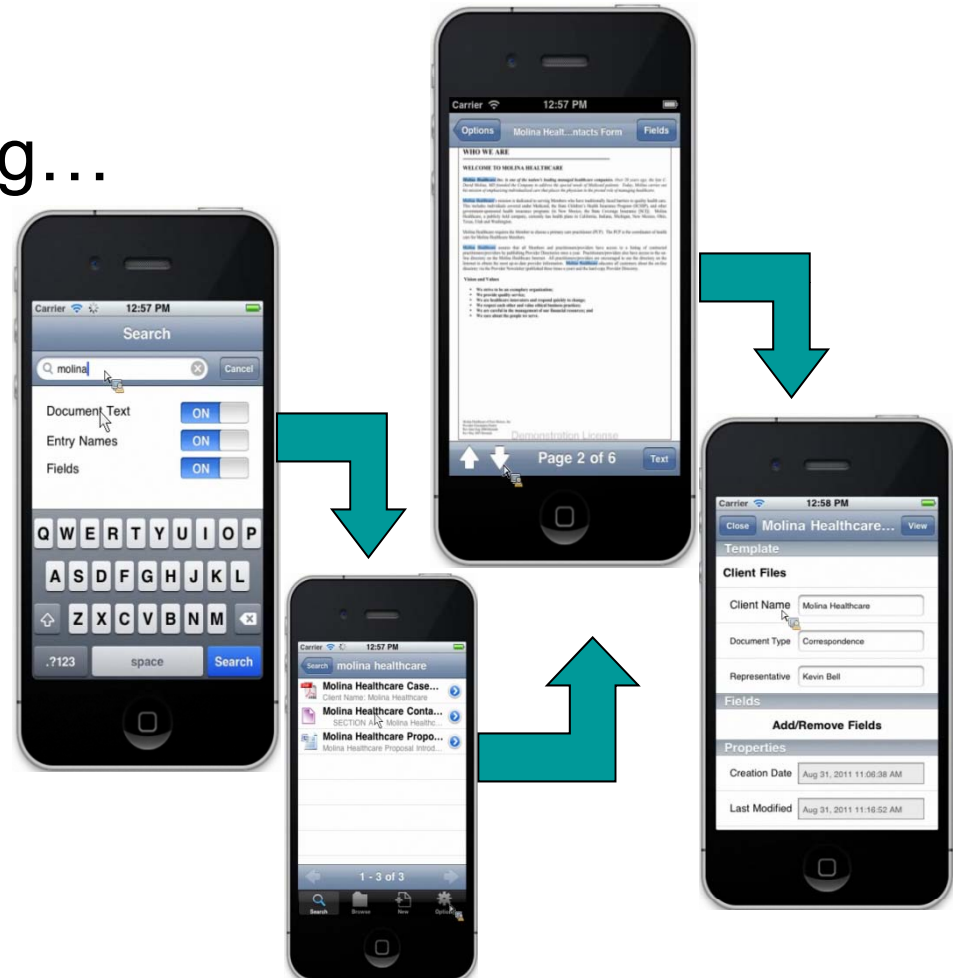
## Anywhere.

❑ Quickly search using...

- ▶ Text
- ▶ Metadata
- ▶ Document name

❑ View/edit document

❑ View/edit metadata





# Lead. Manage. Take Action.



## Anywhere.

- ❑ Create new documents by capturing new images or selecting existing images from the photo library
- ❑ Participate in workflow automation processes by accessing metadata fields





# Lead. Manage. Take Action.



## Anywhere.

- ❑ Maintain auditability over all system interactions





# Information Centric



- ❑ Increase Public Access w/Dynamic Web Portal
  - ▶ Demand for government grows
    - » Easy-to-navigate, easy-to-use public web
    - » Utilizing variety of mobile devices
    - » Encourage document discovery for Web
    - » Improved access to public records
  - ▶ Automate Collaborative Business Processes
    - » Automate complex multi-departmental business processes
    - » Retrieve information from databases and third-party applications
    - » Trigger Workflow activities from third-party applications such as GIS, ERP and others
    - » Windows-like interface – guarantee adoption and minimize training





# Information-Centric



- ❑ Fundamental shift in presenting digital data
  - ▶ Dynamic vs. static
  - ▶ Valid metadata turns...
    - » Unstructured content into structured data that can be:
      - Retrieved
      - Downloaded
      - Indexed
      - Searched using web search applications
  - ▶ Engineer interoperability and openness
    - » Data freely available...
      - within Agencies
      - between Agencies
      - to Private sector
      - to Citizens



# iPhone & iPad Interface



iPad 2:51 PM 15%

**Laserfiche®**

Server URL:

Repository:

Username:

Password:

Q W E R T Y U I O P

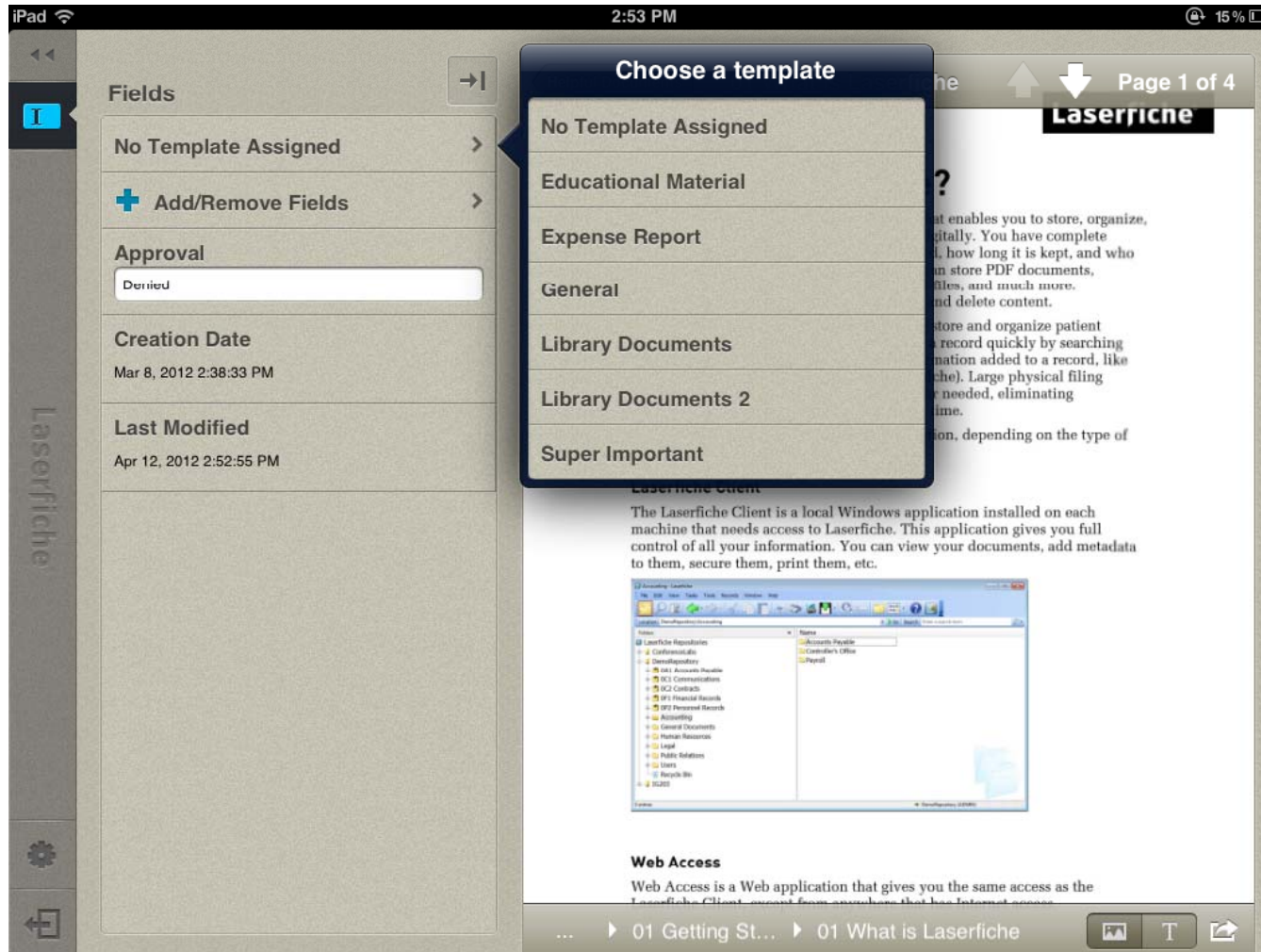
A S D F G H J K L Done

Z X C V B N M , .

.?123 : / \_ - .com .?123



# iPhone & iPad Interface





# iPhone & iPad Interface



iPad 2:54 PM 15%

Cancel Save

Helpful Documents 01 What is Laserfiche Page 1 of 4

**Laserfiche**

**Educational Material**

**Title (2)**  
What is Laserfiche?

**Subject (2)**  
Laserfiche

**Date**

**Approval**  
Denied

**Creation Date**  
Mar 8, 2012 2:38:33 PM

**Last Modified**  
Apr 12, 2012 2:52:55 PM

**What is Laserfiche?**

Laserfiche is a content management system that enables you to store, organize, and access your organization's information digitally. You have complete control over what type of information is stored, how long it is kept, and who can view the information. For example, you can store PDF documents, Microsoft Office documents, audio and video files, and much more. Laserfiche also allows you to create, modify, and delete content.

to store and organize patient information added to a record, like (fiche). Large physical filing is needed, eliminating time. tion, depending on the type of application installed on each application gives you full your documents, add metadata

**Web Access**

Web Access is a Web application that gives you the same access as the Laserfiche Client, except from anywhere that has Internet access.

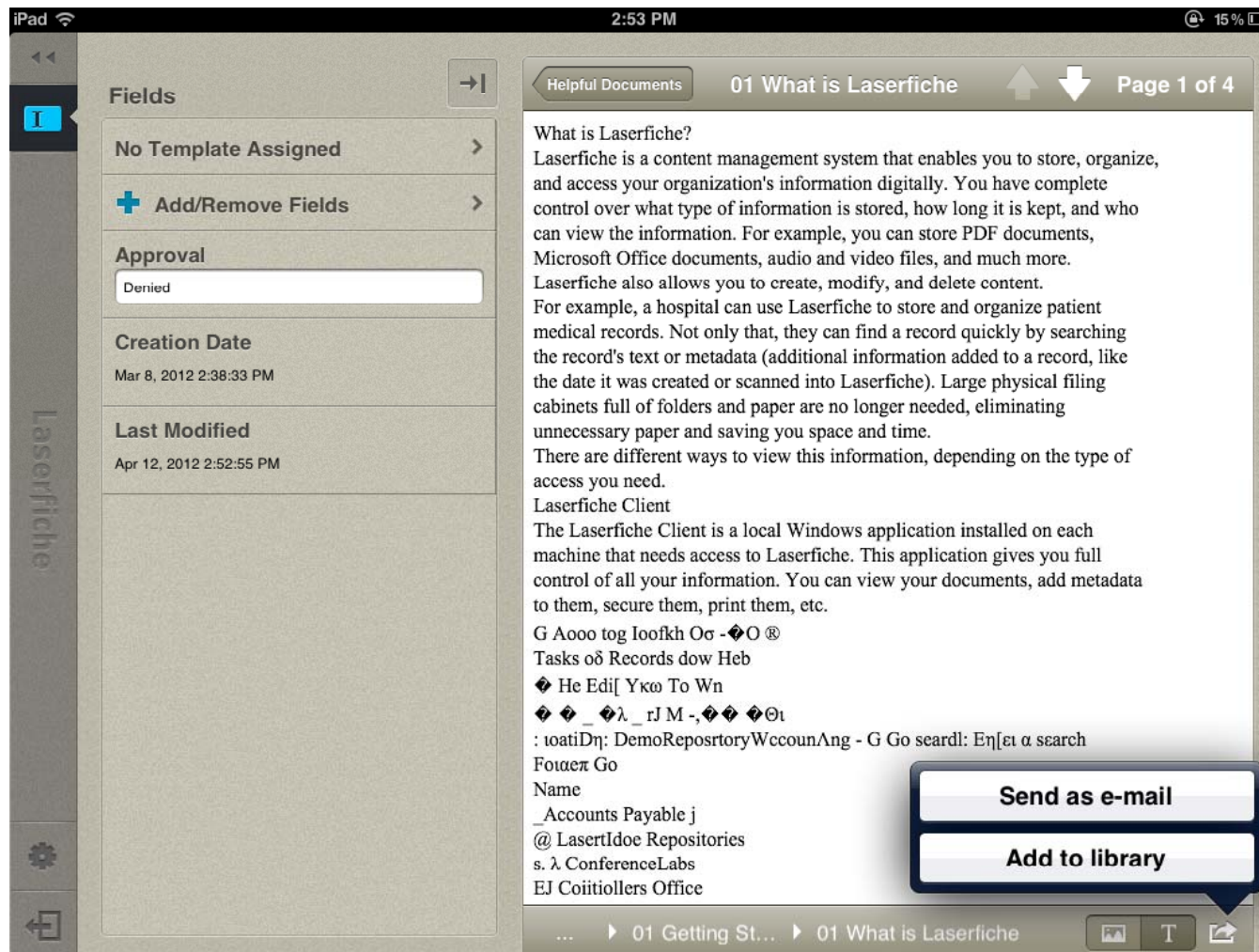
01 Getting St... 01 What is Laserfiche

February 15 2010  
March 16 2011  
April 17 2012  
May 18 2013  
June 19 2014





# E-Mail Directly from iPhone/iPad





# Initiates Approval Launches Webform



Request Approval - Message (HTML)

File Message Insert Options Format Text Review


Clipboard Basic Text Names Include Tags

To... Cody Bettis;  
Cc...  
Subject: Request Approval

If you Approve, please reply with an "A" in the subject line. If you Reject this request, please put a "R" in the subject line.

Thank you!

See more about: Cody Bettis.



My Favorite Chief Deputy

County Office  
123 School Street  
Any Town, TX  
Phone (800) 353.2320

**Big Tall Texan**  
DISTRICT CLERK  
COUNTY, TEXAS

County Office  
123 School Street  
Any Town, TX  
Phone (800) 353.2320

**REQUEST FOR COPIES OF DOCUMENTS**

Date of Request

Cause Number  Court

**COPY OF (NAME OF DOCUMENT/S):**

☐ Certified Copy  
☐ Non-Certified Copy

**NO COPY WORK WILL BE DONE UNTIL FEES ARE PAID.**

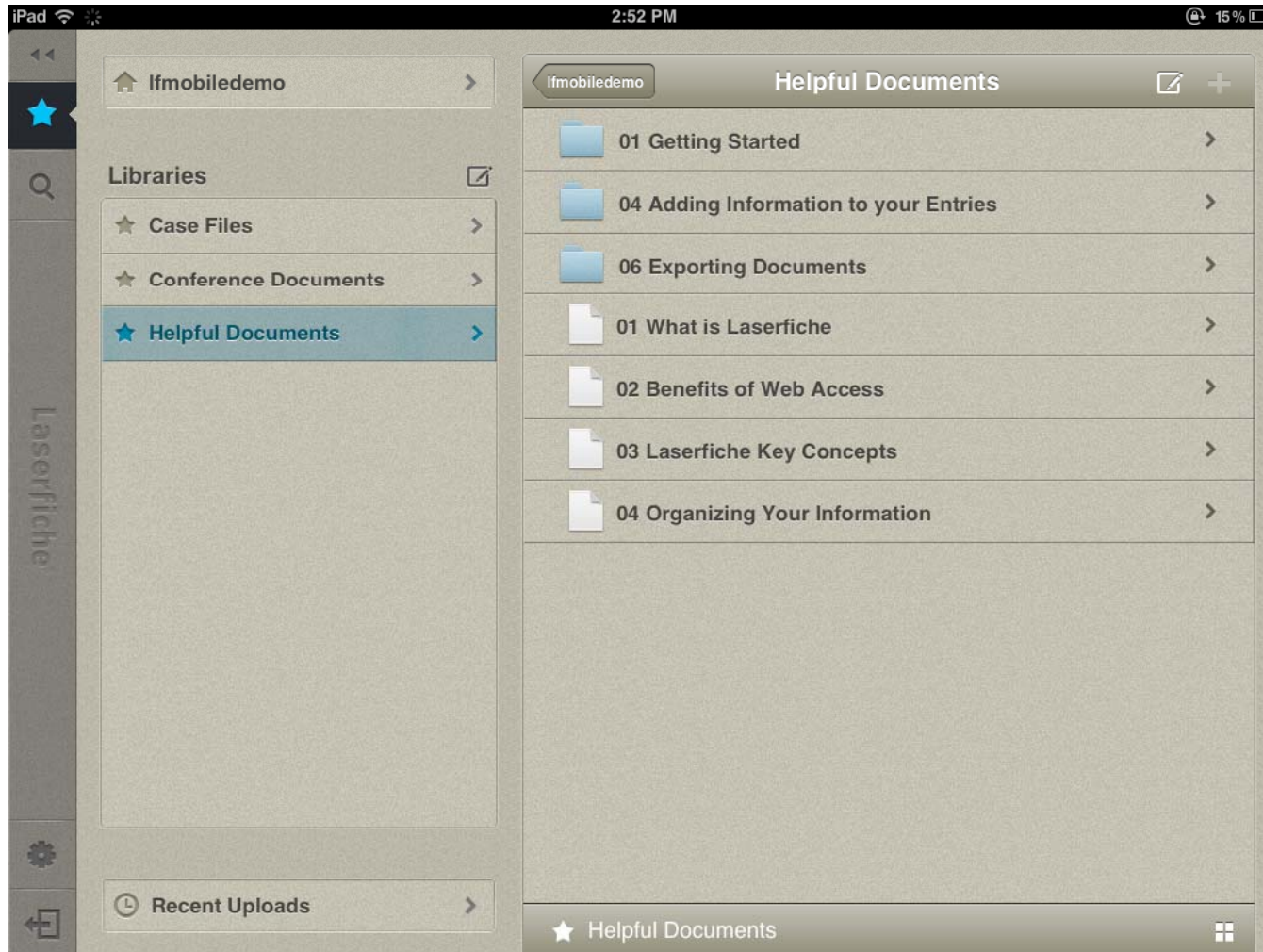
Cost of Copies: \$  (See clerk) Date Cost Paid:

Copies are to be: ☐ Picked up ☐ Mailed Name of party to pickup copies:

If mailed (complete name and mailing address must be listed)



# iPhone & iPad Interface





# Customer Centric



- ❑ Consolidating inter-agency data
- ❑ Secured accessibility
  - ▶ Managing Personal Identifiable Information
  - ▶ Credential management
  - ▶ How humans engage the enterprise
- ❑ Responding to customers' digital information needs
  - ▶ Sharing usable information
    - » Timely, Informatively, Seamlessly
  - ▶ Search
    - » Structuring and tagging content





# Mapping vs. Search

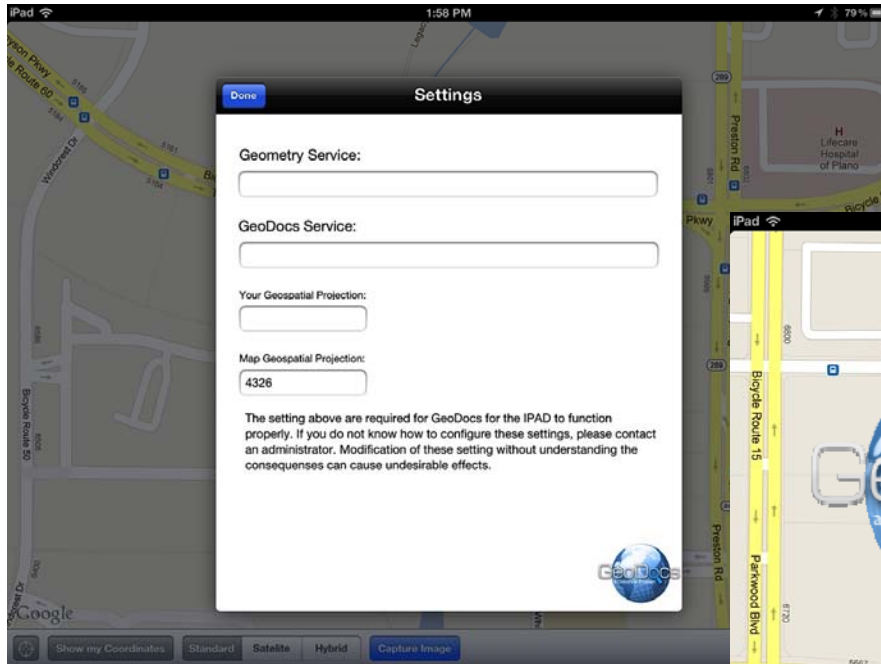


- ❑ Connects ECM documents/data with existing maps
- ❑ Provides the ability to add images directly from the map interface
- ❑ Geo-referencing documents based on map spatial-reference
- ❑ Upload images directly to ECM



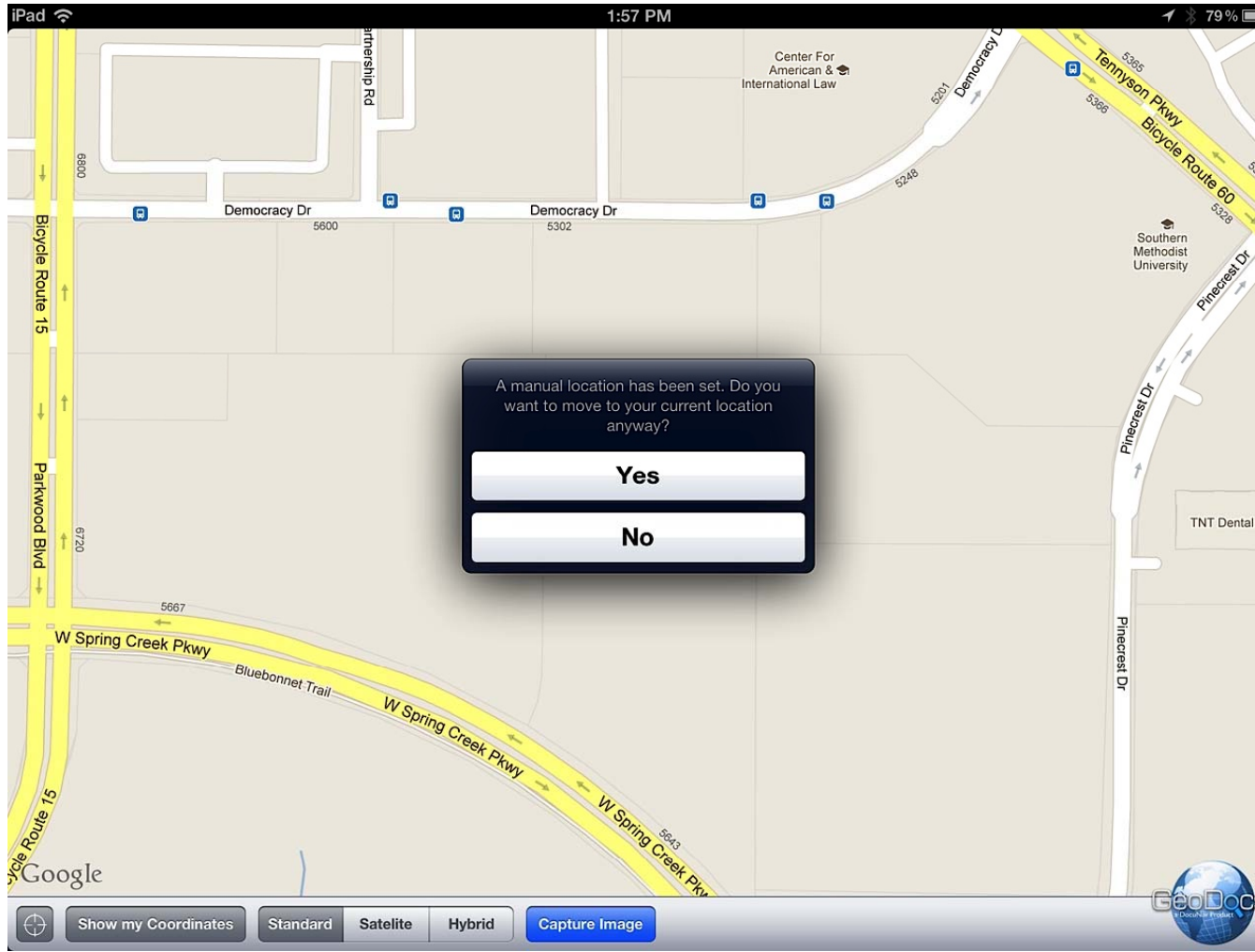


# DocuNav – Geo-Docs Interface





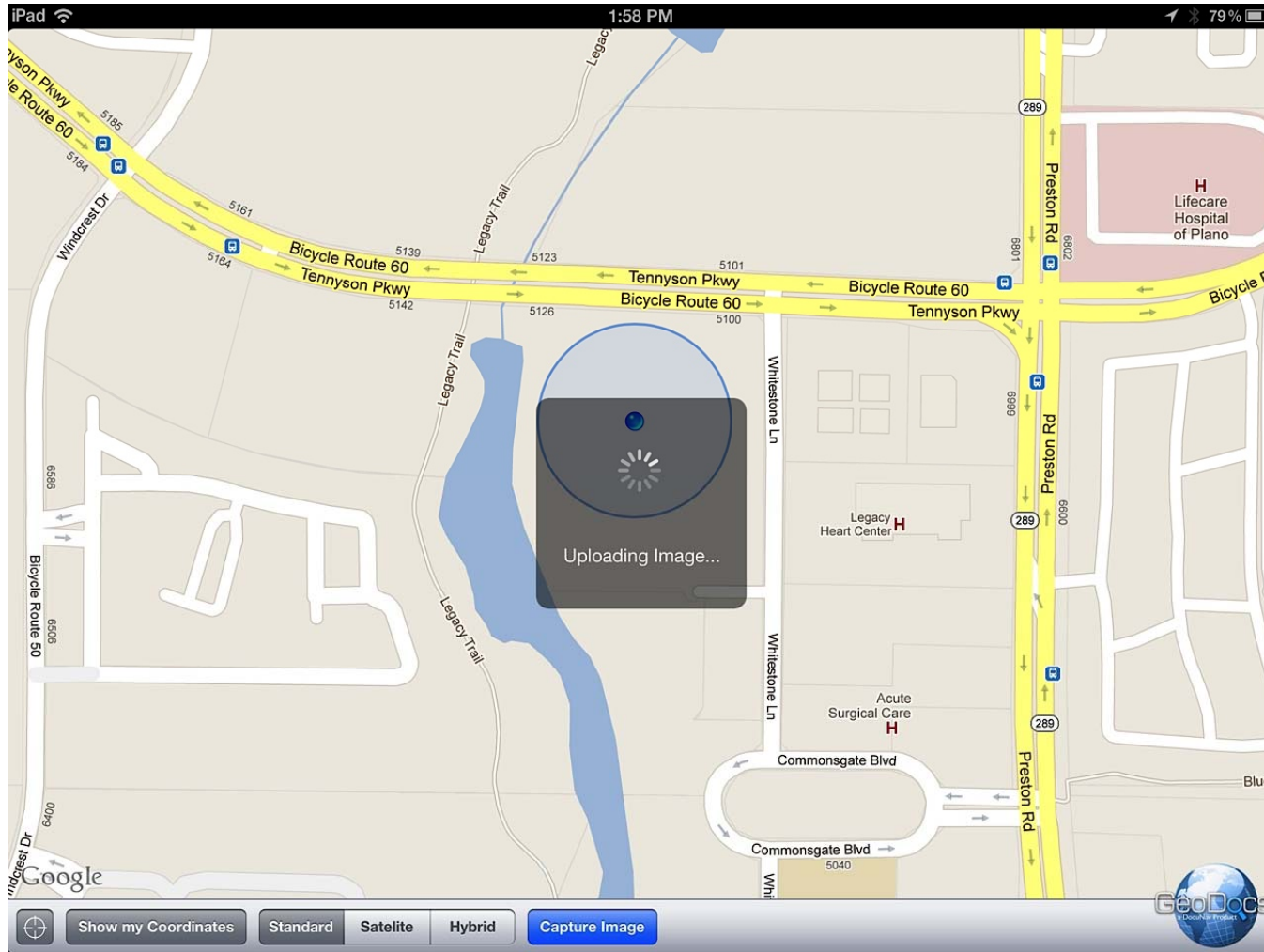
# DocuNav – Geo-Docs Interface



Slide 27

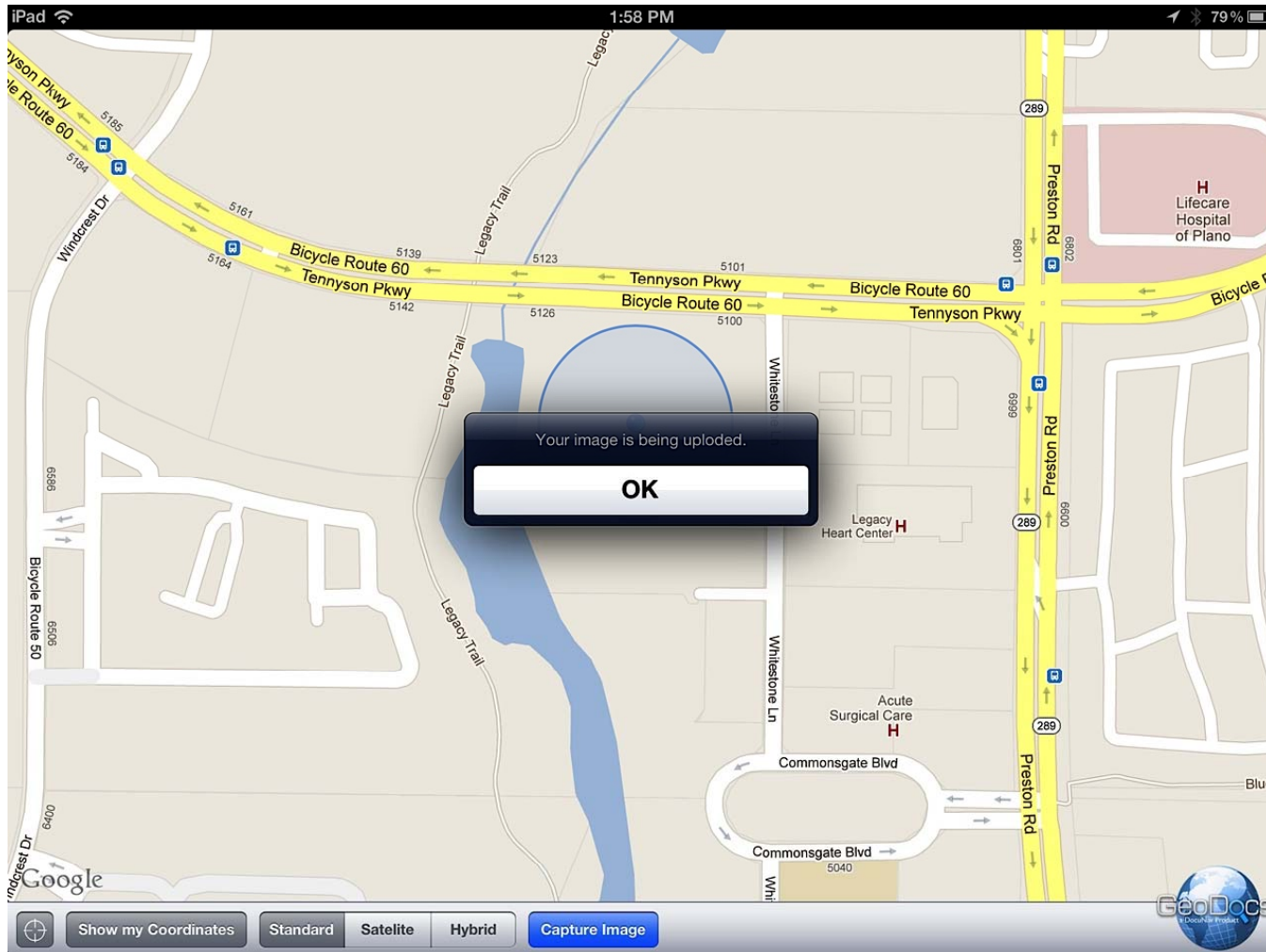


# DocuNav – Geo-Docs Interface





# DocuNav – Geo-Docs Interface







# Review



- ❑ Building a 21 Century Digital Government
  - ▶ Mobile is an integral part
- ❑ The Shifting Landscape
  - ▶ Agility is King
- ❑ 4 Principal Approaches
  - ▶ Shared Platform
  - ▶ Security and Privacy
  - ▶ Information Centric
  - ▶ Customer Centric





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