Leveraging ECM for Mobile Access

Digital Government in the 21st 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
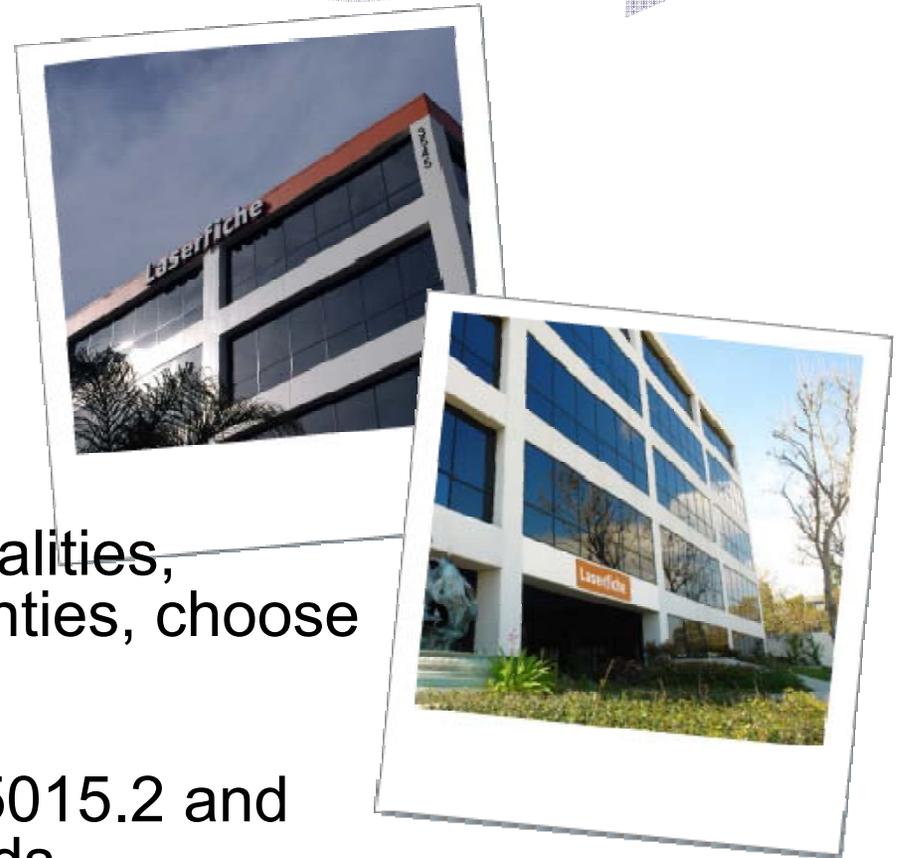
ECM Experts

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)

Agenda

- ❑ Building a Digital Government

- ❑ The Shifting Landscape

- ❑ The Speed of Information

- ❑ 4 Principal Approaches

    - ► Shared Platform

    - ► Security and Privacy

    - ► Information Centric

    - ► Customer Centric

DIGITAL GOVERNMENT:

BUILDING A 21ST CENTURY PLATFORM TO BETTER SERVE THE AMERICAN PEOPLE

MAY 23, 2012

❑ 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  - ► Decommissioning outdated systems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
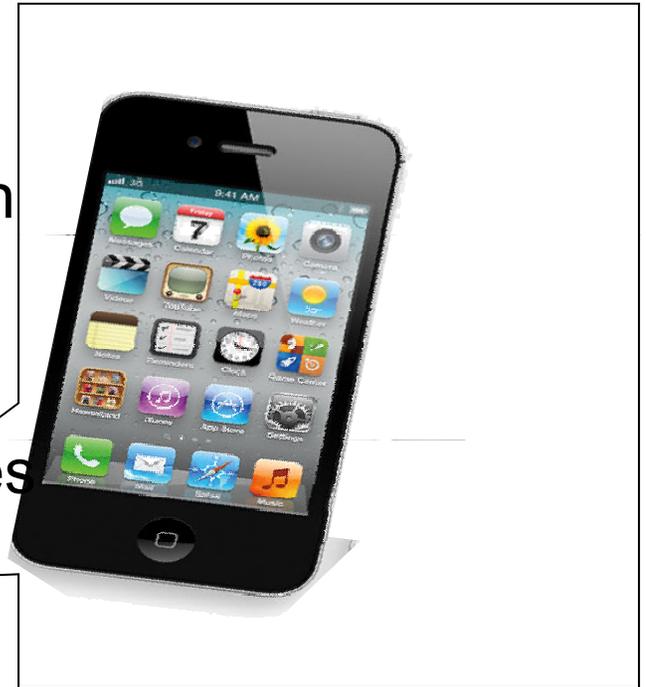
Fax

E-mail

Phone

Files

REPOSITORY

Multimedia

Scan

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
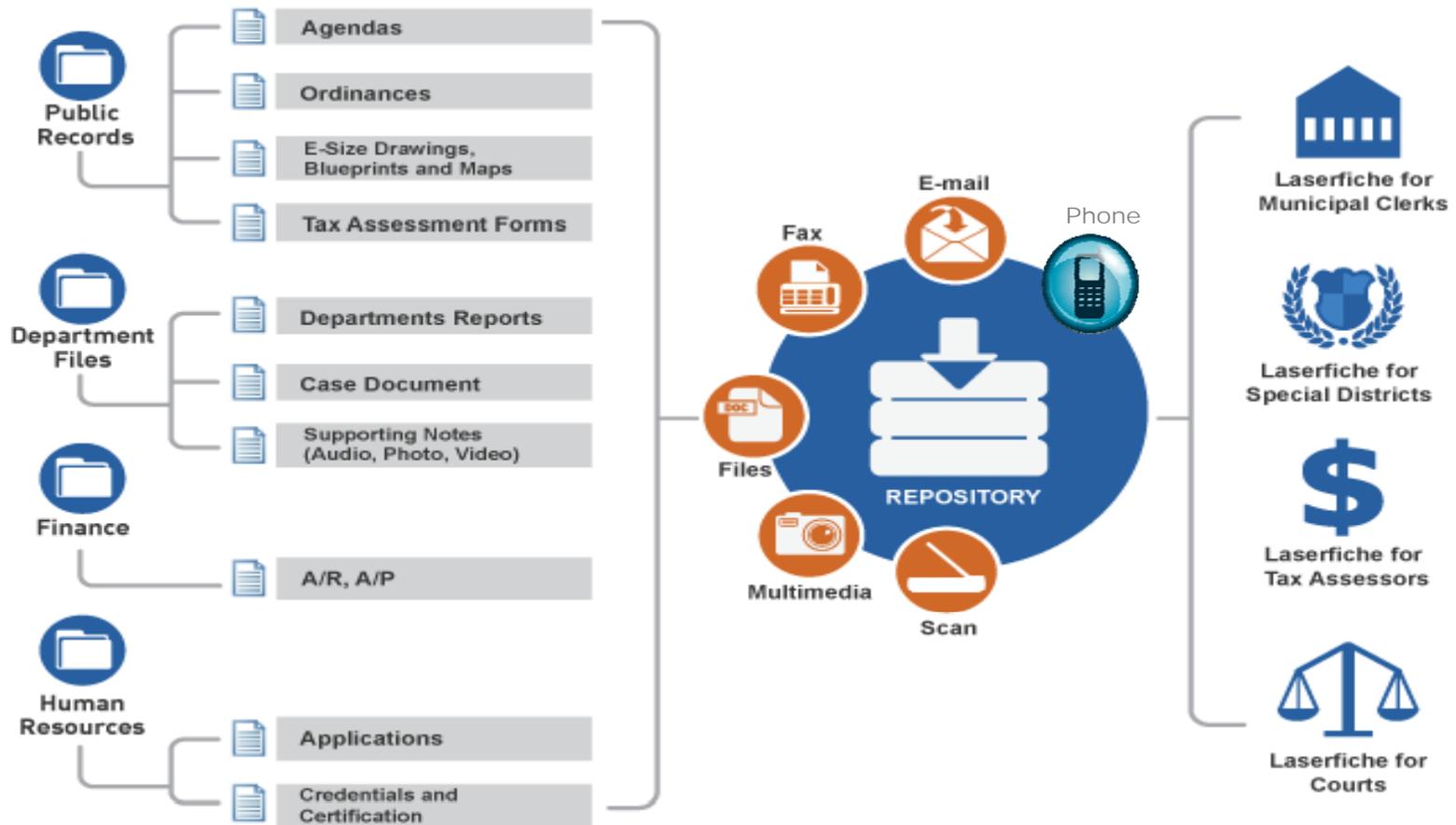
Security and Privacy

❑ **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 availably 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
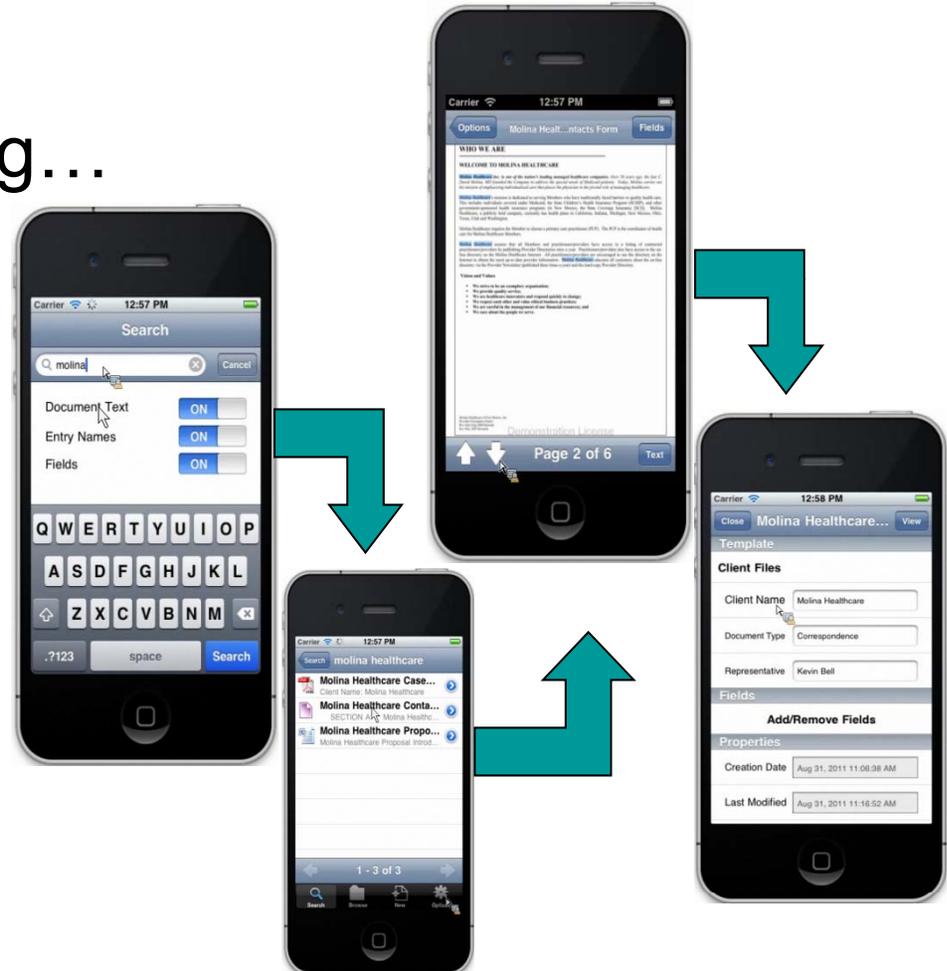
Lead. Manage. Take Action.

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

iPhone & iPad Interface
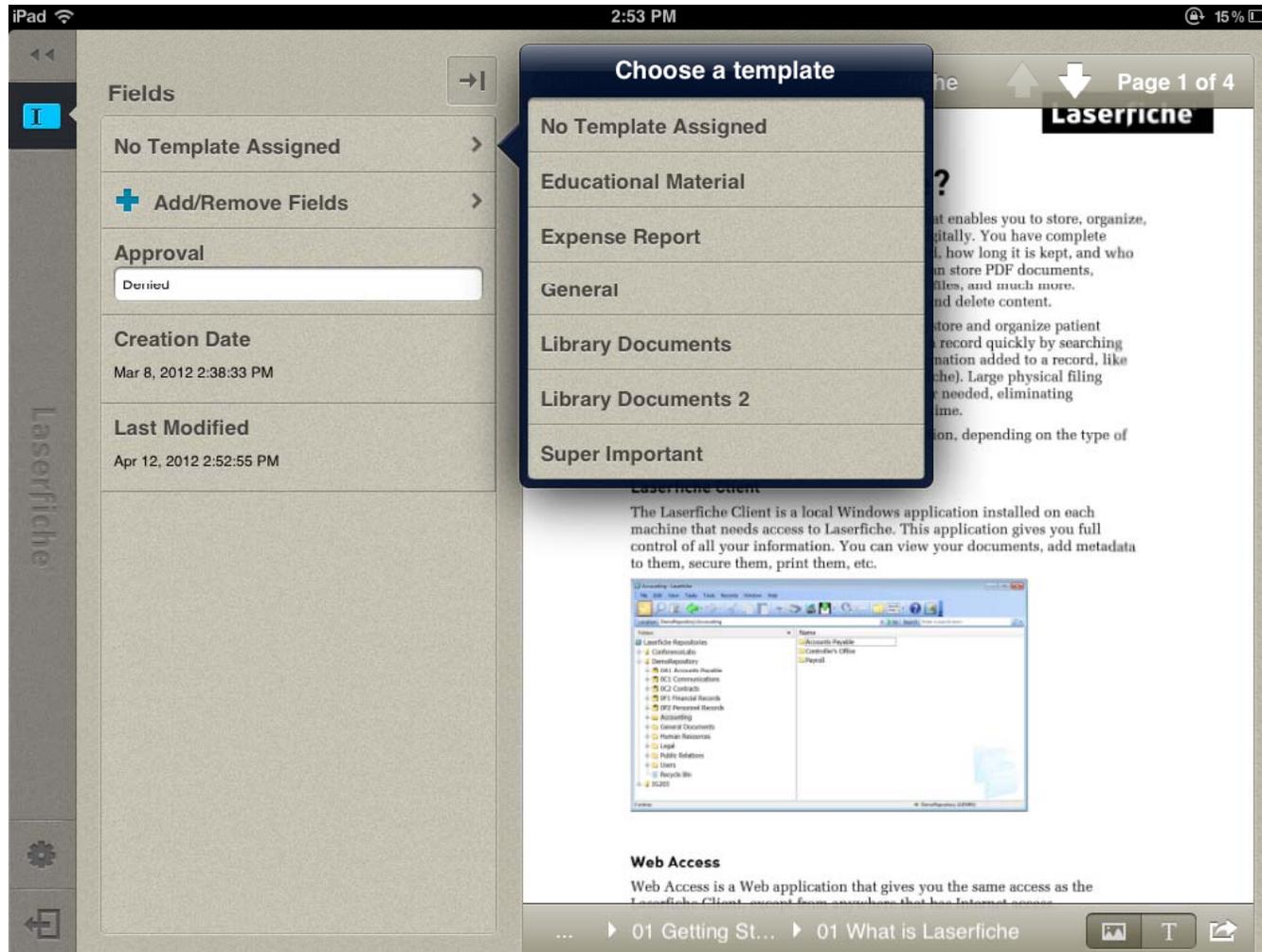
iPhone & iPad Interface
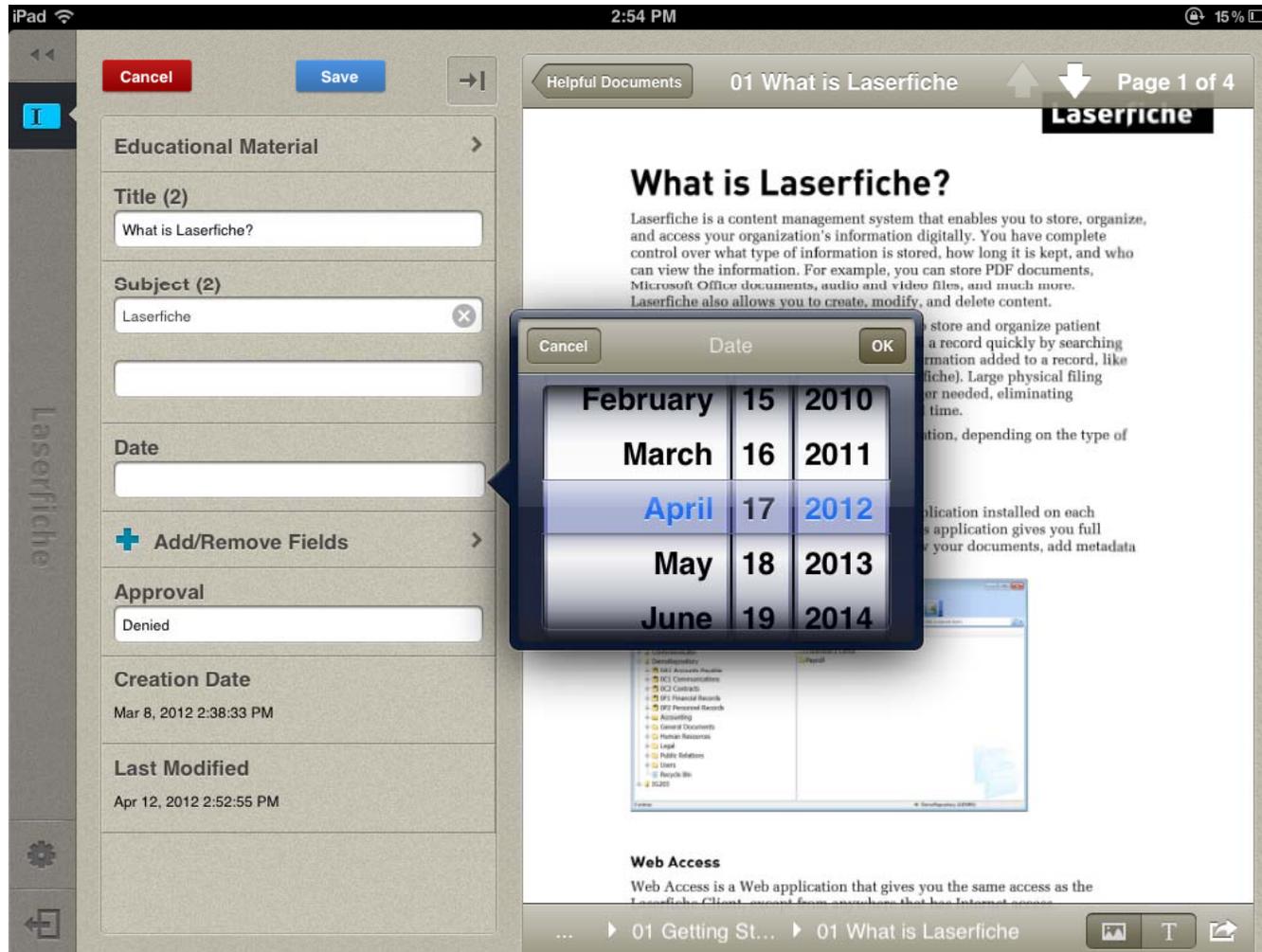
E-Mail Directly from iPhone/iPad
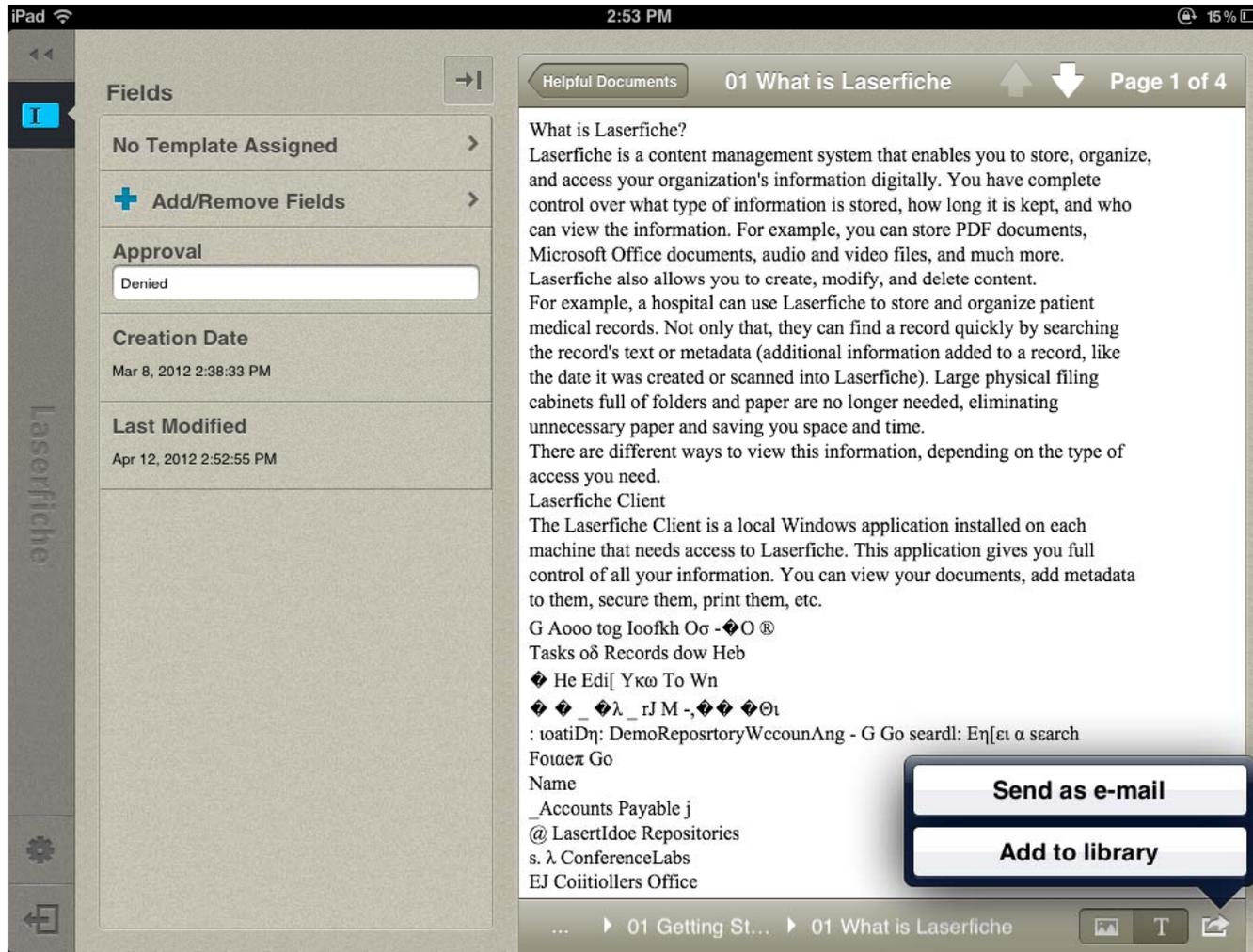
Initiates Approval Launches Webform
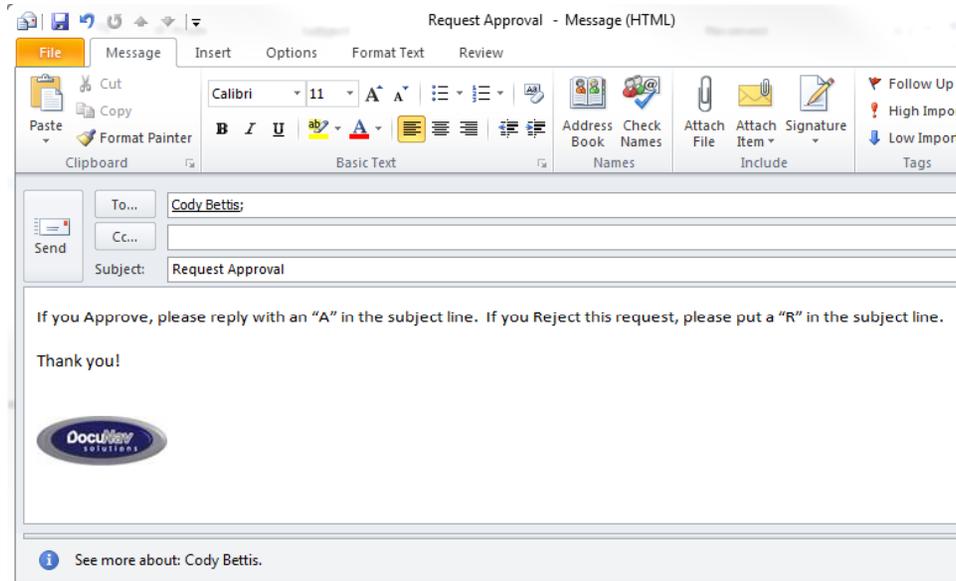
iPhone & iPad Interface

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
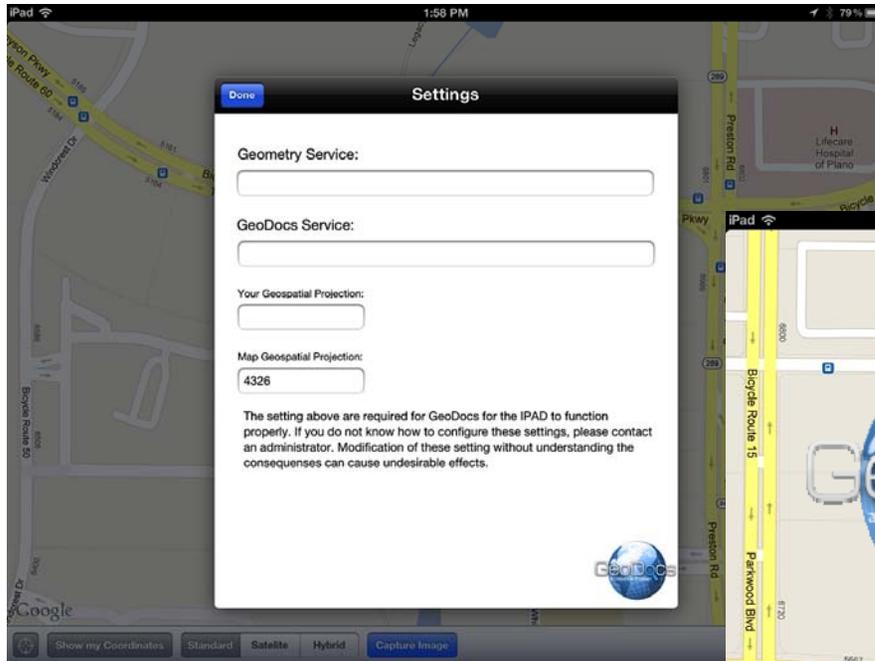
DocuNav – Geo-Docs Interface
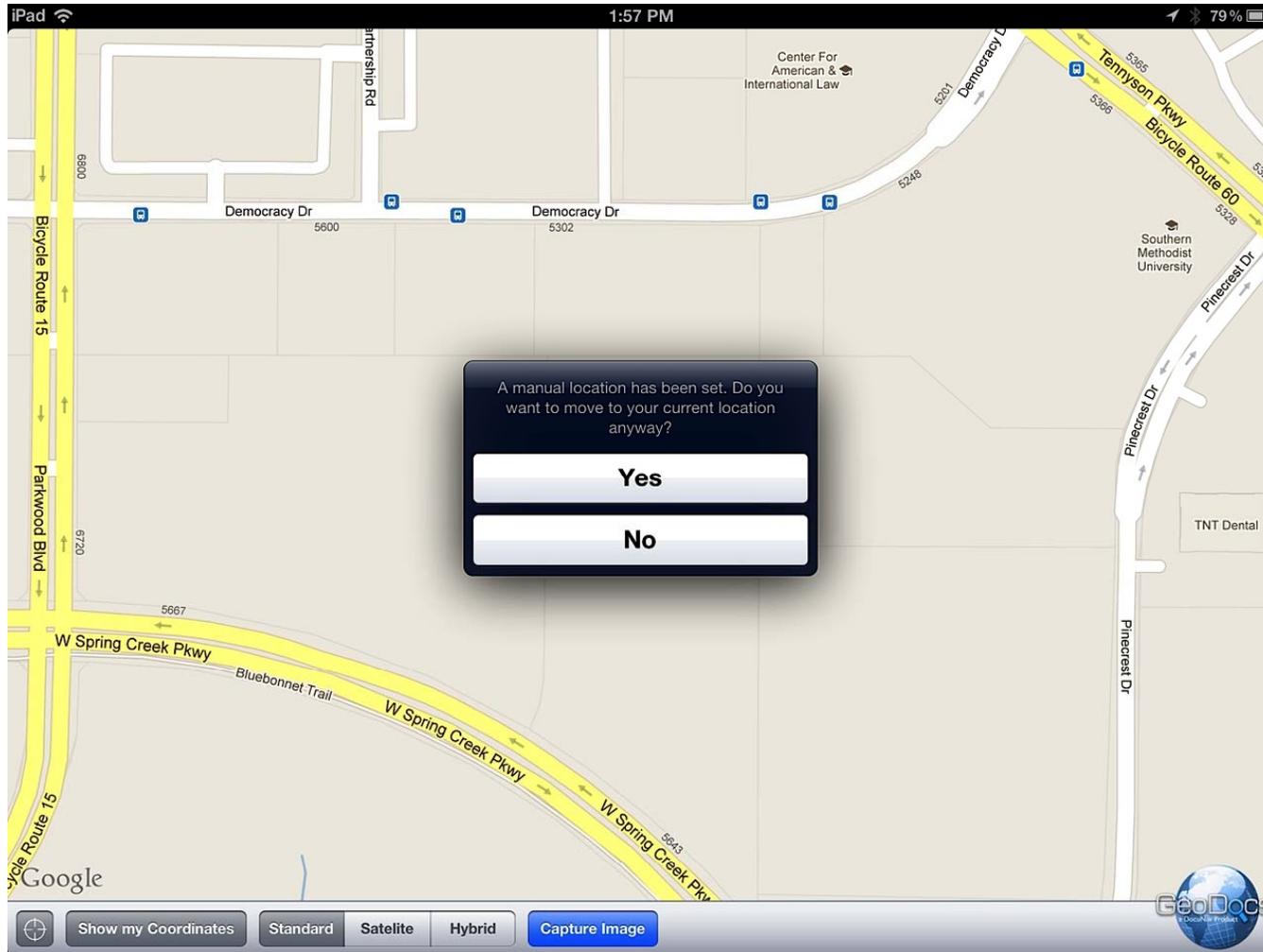
DocuNav – Geo-Docs Interface
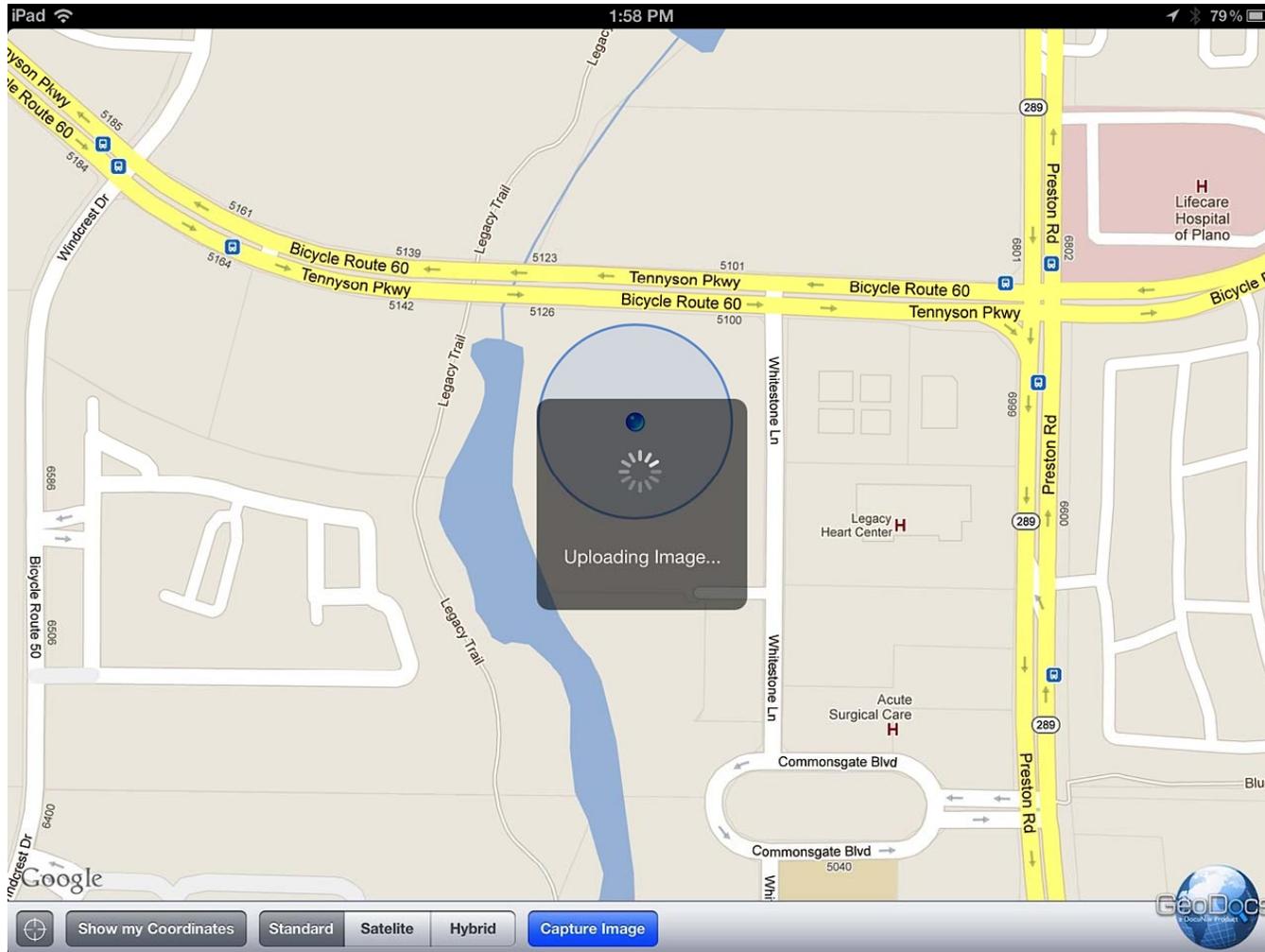
DocuNav – Geo-Docs Interface
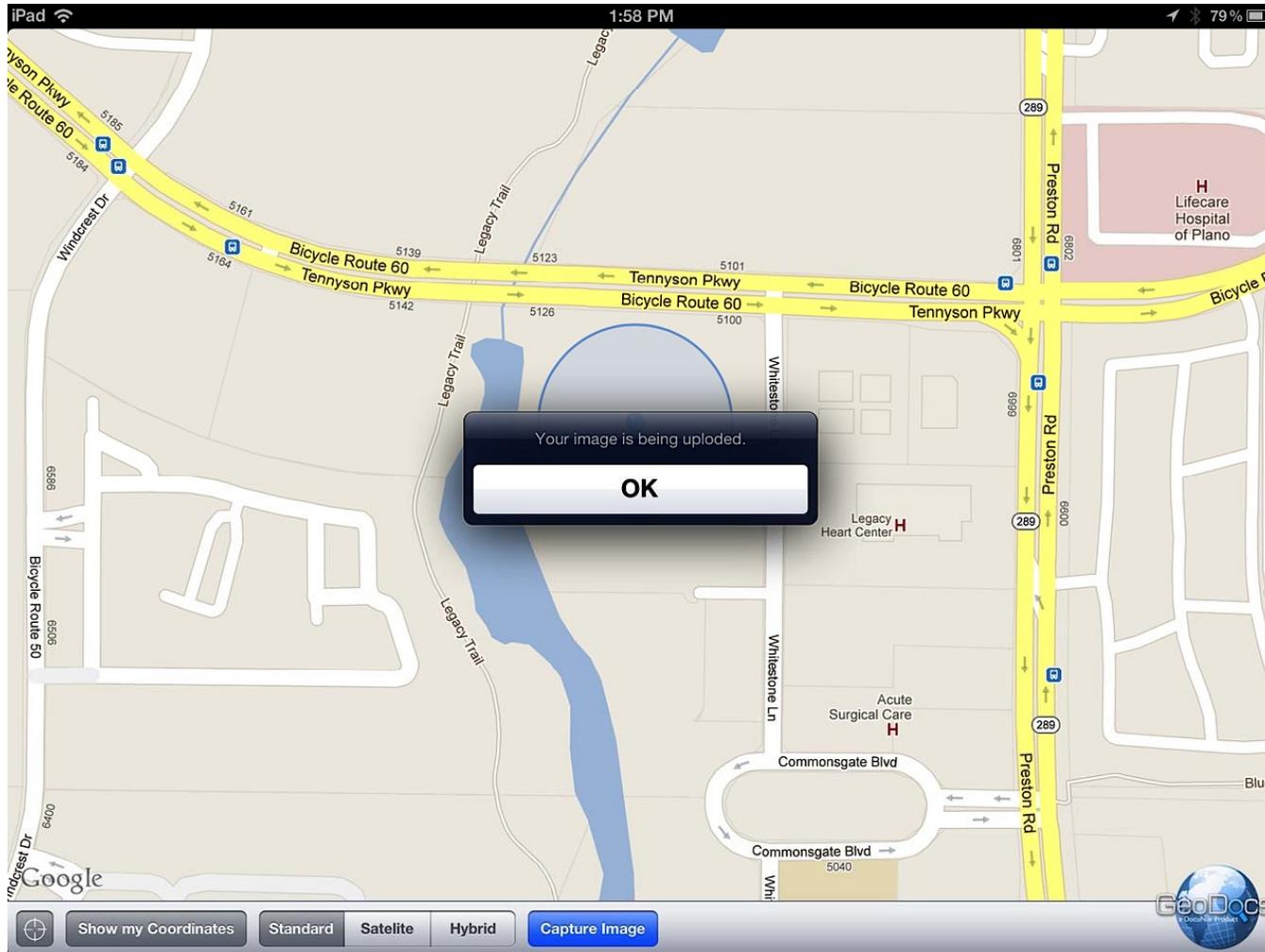
Review

- ❑ 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

DocuNav Solutions

5048 Tennyson Parkway
Suite 110
Plano, TX 75024
www.docunav.com
Office: 800.353.2320