



## NEW OUTREACH FEATURES ANNOUNCED FOR 2016

Toplevel is pleased to announce a range of updates to our Outreach platform, many of which are based on customer requests over the last six months.

### OUTREACH 2016 IMPROVEMENT HIGHLIGHTS INCLUDE:

- Enhanced security incorporating full AES 256 encryption for all data at rest, staff applications and case records, as well as additional password security features around access to failed password attempts. Apart from providing improved security these enhancements help future proof Outreach users against EU Data Protection Regulations due during 2016.
- Better usability with easier navigation and the addition of 'out of the box' help options for customer and staff users. PLUS a new simple server installation process and easy self-service configuration of our Mobile Data Module for IT administrators.
- Improved performance for our dashboard (workbench and process desktop) as well as faster information retrieval that improves user experience at peak demand.
- Optimised integration – Open Studio enhancement to improve database interaction and new web services that simplify third-party integration with Outreach and provides greater flexibility for customers using Service Orientated Architectures (SOA).
- Open standard APIs – Additional open standard APIs that allow external applications' additional control and integration with Outreach processes.



## MAJOR ADVANCE FOR DEVELOPERS USING OUTREACH

Outreach now supports programming with Visual Studio to create a separate .NET assembly. The benefit is to allow Visual Studio developers to use their familiar development environment with Outreach and also facilitates code reuse, e.g. reusable business rules can be developed in .NET leveraged by Outreach and other parts of the IT estate.

Previously Outreach supported two kinds of embedded scripting: VB Compatible Basic and a newer more open standards compliant VB.NET option.

Outreach software development will now focus on .NET, which we believe will be a major benefit for developers using the

platform. Developers will be able to use their familiar Visual Studio skills (Including C# if maintained in Visual Studio) to develop open standards compliant code, which will provide improved re-usability for use in future Agile deployments.

In light of this we will bring to a close our VB compatible BASIC support and development activity from January 2017, although we will continue to offer bespoke support via our professional service teams. Outreach users presently using VB Compatible Basic, should look to convert to a supported script type such as VB.NET or separately maintained .NET code. Please feel free to contact us if you have concerns or want to discuss the evolution of your systems.



# OUTREACH 2016 ENHANCEMENTS

## SECURITY FEATURES

### Outreach Staff Zone can now be configured to encrypt fully all data at rest

**HOW?** All data will be AES 256 encrypted in a Single Zone system or for Staff Zone servers in Dual Zone systems. The database is encrypted using SQLServer Transparent Data Encryption (TDE), which facilitates management of keys so that data can be backed up using the same encryption. Outreach will also encrypt other data files outside the database.

**THE BENEFIT** It will enable increased data security and closer compliance with the EU Data Protection Regulations due to be put to Parliament this year. Evidence of encryption of any data lost demonstrates that best practice data protection is being followed and is also expected to be a defence against mandatory breach notifications.

### Outreach's Dual Zone capability has now been improved so that both the Encrypt and Staff Zone servers can be encrypted

**HOW?** Previously, only the Encrypt Zone server of a Dual Zone system could be encrypted. By using SQLServer Transparent Data Encryption (TDE) and the new file encryption tool in Outreach, the Staff Zone server can be encrypted as well.

**THE BENEFIT** Internal staff who process, search and report with customer data will have their case records and supporting documents encrypted, futureproofing against the EU data protection regulations mentioned above. (TechUK is running

training courses on the topic over the summer – find out more at [www.techuk.org/training/public-sector-courses](http://www.techuk.org/training/public-sector-courses)).

**NOTE:** SQLServer TDE and the file encryption tool encrypt the database and files on the server independently and separately. This means that to fully encrypt the Staff Zone server, they must be used together. If you migrate from Single Zone to Dual Zone you will need additional licences and some professional services to help you migrate the data. Please contact your account manager if you want to find out more.

### Improved password security

**HOW?** Information on attempted passwords are no longer stored in the source code of the generated web page. All password fields in the e-Form are cleared whenever the web page is newly generated or reloaded.

**THE BENEFIT** Information about users' passwords can no longer be accessed via failed password attempts either on screen or via the HTML source code of the web page. This means that citizen password security is improved.

**NOTE:** Custom e-Forms containing password fields may need to be retested. Care should be taken with e-Forms which use the contents of a password field after a new page has been generated e.g. when a button is pressed or the page is reloaded. It should also be noted that the behaviour of any password fields created in the e-Form Designer has changed. After any web page is generated, the password fields in that page will be blank. Web page generation happens when a page is reloaded or a button is pressed.

## PERFORMANCE FEATURES

### Improved performance of the Dashboard (Workbench)

**HOW?** The speed of information retrieval has been improved affecting Messages, Saved Items, and Workqueue tabs.

**THE BENEFIT** Faster average response times and better customer experience during peaks in service usage.

### Increased performance with .NET Memory

**HOW?** Solutions using VB.Net embedded scripting and separately maintained .NET Code can now benefit from increased performance when utilising .NET Memory.

**THE BENEFIT** Server response time improvement when concurrent user numbers accessing services are high. Provides improved user experience through faster response times.

### Flexible storage of attachments from often used working directories

**HOW?** The save location for attachments can now be chosen by customers by entering a file path in the 'Attachments Directory' field in the server configuration screen.

**THE BENEFIT** Tunes server performance by storing attachments (which are generally accessed infrequently, but may take up a lot of storage space) separately from often used working directories. The often-used working directories can be located in a fast access area of SAN storage.

**NOTE:** To continue saving attachments in the working folder, this feature can be ignored and the 'Attachments Directory' field can simply be left blank. If the 'Attachments Directory' is changed, only future attachments will be saved in this location, leaving historic attachments in the old location. Existing attachments must be initially transferred by hand to the new location.

## USABILITY FEATURES

### Improved Outreach server installation method

**HOW?** Redesigned user interface and an improved method using an MSI package.

**THE BENEFIT** Reduction of the number of steps staff performing the installation need to do "by hand", simplifying the installation process and reducing the potential for errors.

**NOTE:** Processes to install the agent and configure the PDF printer remain unchanged.

### New flexible user personas. Users can pick from two themes for Workbench Profiles

**HOW?** In 'Workbench Configuration', the two themes can be customised separately using the "Design Public Theme" and

“Design Staff Theme” buttons. The theme applied to a Workbench Profile is chosen using the “Use Public Theme” checkbox, which can be accessed via the “Create new profile...” or “Edit...” on an existing profile in ‘Workbench Configuration’. The default option for this is unchecked, meaning the staff theme will be applied.

**THE BENEFIT** Greater flexibility over the appearance of a user’s Workbench, allowing the theme used for each user profile in ‘Configuration Settings’ to be chosen from two customisable options. For example, the Workbench of staff users could have a theme which fits in with their internal system, whereas a public user’s Workbench could have a theme consistent with the organisation’s external branding.

**NOTE:** Themes can be changed without stopping the system there could be some transitional effects seen by live users. For existing profiles, the staff theme will be applied to the Workbench. If these profiles are opened after the install of this feature, unless “Use Public Theme” is selected, they will continue to use the staff theme. *This new feature is based on a customer request.*

### More ways to display ‘Help’

**HOW?** Extension of the options available for fields, headings, and captions in the e-Form Designer. There are six more help options available including ‘Popup Help Text’, ‘Link to Popup Help URL’, ‘Inline Text’, ‘Indented Inline Text’, ‘Dropdown From Caption’, and ‘Dropdown from Help Link’.

**THE BENEFIT** A more flexibility range of usability options for programmers to use through a simple pick lists (no coding). We believe which is especially useful to organisations following a user-led approach as recommended by GDS.

### More flexible and easy to use browser navigation support

**HOW?** Optional enablement of Browser Back, Forward and History features. Users will be able to use browser navigations

to go between Outreach pages. When this setting is true, separate items are placed in the browser history for separate sections of the e-Form. This allows the user to use Browser Back, Next and History to change the currently displayed section.

**NOTE:** Modal e-Forms Windows – users cannot navigate in to and out of these with browser controls. This enables the Design Studio users to ensure that users should select an option from the controls by presenting a Modal Window. However, other types of dialog can be backed out of using the browser navigation controls.

### The Process Modeller now allows the “sent from” and “reply to” email addresses for emails to be specified

**HOW?** Outreach Process Modeller now allows the “sent from” and “reply to” email addresses can be specified for each process, instead of all processes using the addresses specified in the system configuration.

**THE BENEFIT** For example, it enables an email to be sent from an unmonitored email address but with an address to which the recipient can reply. Allows more flexibility for organisation that don’t want a “do-not-reply” email. Increased service desk flexibility.

### New character count display

**HOW?** Design Studio users can limit the number of characters that users can enter into fields. The new character count is displayed below the field and updated dynamically as the user types.

**THE BENEFIT** Simplified data collection – provides a point and click configuration options and allows administrators to configure the number of characters in a response field to take into account any backend database character limitations. Length Checks – this feature also give more flexibility in controlling the length of customer responses.

**NOTE:** Outreach Developer Module is required to use this feature.

## INTEGRATION

### New Web Service API for better integration with third party case management solutions

**HOW?** The new API displays additional text in the ‘My Projects’ tab of the Workbench. This additional text can be used to provide notes to the user to aid in completion of a given task. This works in conjunction with APIs, which allows an external application to add tasks to a user’s My Projects area. The API sets the additional text on a task by task basis. It has parameters to control if the text is displayed when the task is in the initial state, in progress or completed.

**THE BENEFIT** Facilitates collaborative digital working with the customer since a bespoke staff facing application integrated with Outreach can manipulate interactions with customers. The API builds on our commitment to an open source development approach and provides a tool for technical architects to develop Service Oriented Architectures (SOA) that enable easier integration with back-end case management systems.

**NOTE:** A new Web Service API has been added to allow the recall and aborting of Outreach process tasks.

### Extension of existing web server API allowing external systems to integration with Outreach Processes

**HOW?** Outreach web services APIs allow external applications to act upon and control Outreach processes and provides the ability to Recall or Abort an Outreach Process.

**THE BENEFIT** New API approach to provide closer front-end to back-end integration, especially in SOA environments.

### New ability to customise the Mobile Data Collection Module

**HOW?** Previously the module required Toplevel professional services to customise its look. Now it can be configured using standard Outreach product features.

**THE BENEFIT** Simplified configuration of mobile data collection. Allows customers to configure the module for the first time in line with Toplevel’s policy of providing ‘open’ implementation and configuration options. Reduced project costs.

**NOTE:** Mobile Data Collection is a separately licensed Outreach Module for data collection on offline devices using the standard web browser on these devices. Contact your account manager for details.

## DEVELOPER MODULE API ENHANCEMENTS (BASED ON CUSTOMER REQUESTS)

### A lookup dialog showing a list of users with a particular role in a group can be displayed

**HOW?** The Developer Module includes a new API to allow script to display a lookup dialog of users which have a particular role in a group.

**THE BENEFIT** Allows identification of users to nominate given tasks and workflows or access to specific information through simple lookups.

### New e-Form API FormPrintToFile

**HOW?** Normally such PDF files will be downloaded on to the user’s browser, but this API allows generation of PDFs to files on the server. Once on the server they can be used as needed by script, for example to store the PDF or email it to a particular email address. Outreach Developer Module is required to use this feature.

**THE BENEFIT** This allows a PDF generated from a “Server: Retrieve PDF” File action to be use by the script.



## About Equiniti Toplevel

Toplevel provides end-to-end digital and case management solutions that allow Public Sector organisations and individual case-workers to interact more easily with other departments and the citizens they serve.

We improve customer experience and help staff to do their jobs quicker and better by replacing paper, telephone and face-to-face services with more efficient digital alternatives

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