

Outreach
FROM TOPLEVEL

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OUTREACH – A TRUSTED DIGITAL AND CASE MANAGEMENT PLATFORM FOR THE PUBLIC SECTOR

Outreach is Toplevel's secure COTS (Commercial Off-the-Shelf)-based software product. A certified Microsoft platform-ready solution, it delivers robust, reliable digital and case management solutions for the UK public sector.

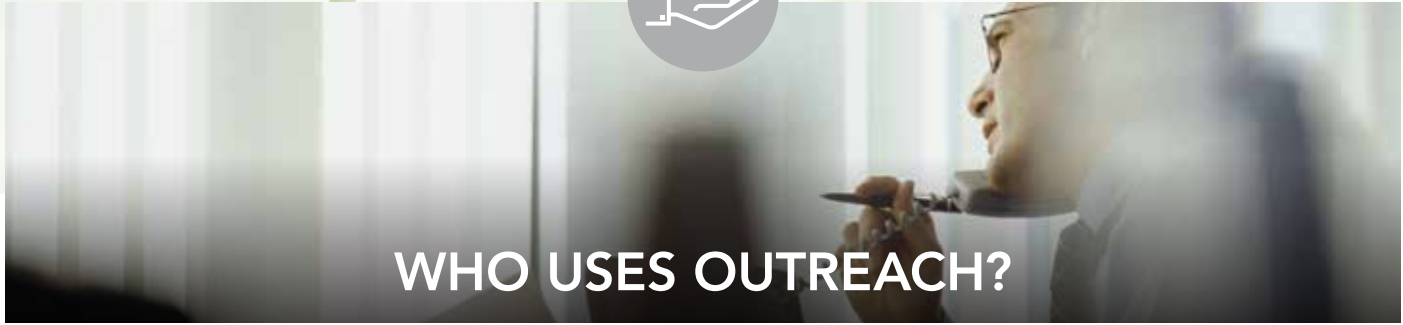
Outreach enables a range of "channel shift" digital services, compliant with both the Government's Digital by Default Service Standards and HMG's Security Policy Framework.

The solution supports digital interactions that take place between public sector organisations, citizens and businesses, and as a result its technology doesn't treat 'external users' as arms-length endpoints in a process; everything that Outreach can do is designed to enable all parties to work together to get jobs done across organisational boundaries.

OUTREACH DELIVERS:

- Capabilities that fulfil requirements of online and staff-facing applications, including self-service appointment booking, online form presentation, workflows, case and process management, data collection, service eligibility and application processing.
- Fast deployment of services that can be accessed by multiple users across diverse locations.
- Secure permissions-based access methods and strong data protection techniques to enable secure collaborative working.
- Simple service design and development utilising the Open Design Studio within Outreach.
- A mature COTS / low-code-based technology platform.

Outreach has been developed using .NET and SQL with SQL Server Reporting Services. In addition, Outreach supports open standards for data exchange, offers comprehensive integration APIs and also utilises a partnership with ISV ScribeSoft to provide a range of integration options including connectors to 40+ business application suites including the likes of SAP, Oracle and Microsoft dynamics. Outreach is "CMS-agnostic" so integrates easily with both Open Source and proprietary CMS (Content Management System) software.



WHO USES OUTREACH?

Outreach has been deployed in over 50 major public sector projects many of which are classified IL3 /OFFICIAL Sensitive service. Here are a few examples:



Appointment booking system to support 850,000 appointments per year.



Provides 40 digital services, with combined transaction throughputs of over 1 million per year. The initial project delivered a saving of 50% and services take-up jumped 15 times in the first three months.



End-to-end digital services for 100,000 early year's providers and 4,000 children's homes to collaborate with Ofsted staff. Business process automation for staff saves time processing approvals and enables rapid response to serious incident notifications.



End-to-end grants system, managing grants for apprenticeship schemes to the value of £15m per annum.



End-to-end digital service for over 20,000 legal professionals to claim £900 million criminal legal aid per year. 400 case workers use Outreach which halved the time it took to pay claims, delighting customers. 10,000+ claims per month are processed.





OUTREACH. WHO NEEDS IT?

Outreach is a strong option for your organisation if you want to:

1. Scale from small to large, complex, digital and/or case management projects
2. Meet Government requirements such as Digital by Default Service Standards, and WCAG/ AA Compliance
3. Provide service uptime rates of 99.995%
4. Ensure security of services and citizen data and require IL3 / OFFICIAL compliance
5. Enjoy faster service deployment and early delivery of working prototypes
6. Avoid digital lock-in by empowering analysts and web designers to manage and update digital deployments
7. Save costs by designing digital templates, work flows, case records, and forms once and reusing them again and again across multiple projects
8. Have ongoing support for all common browsers out-of-the-box
9. Avoid delays associated with integration across IT systems and applications
10. Allow easy development of open source extensions



...AND WHAT APPLICATIONS DOES IT DELIVER?

Appointments: Secure web-based diaries and self-service bookings.

Fully Digital eforms: Online transactions that guide citizens through on-screen menus, using any browser. Automatic prevention of accidental loss, application of business rules & improved data quality.

Case Management: Secure, easy-to-use structured data collection. Support for business rules, guidance, approvals, case creation, e-signatures, workflow, (business process management), resource booking, multichannel communication and document publishing.

Course booking: Secure, easy to use web screens. Single shared repository of course information for all staff and customers. Valuable for local authorities (e.g children's activities and leisure services).

Applications: Capture of electronic applications from web sites, e.g. for grants, accreditations, schemes, permits, licences. Built-in rules save staff time checking applications and keying into back-office systems.

Audits: Collection of information from customers / auditors with secure online wizard-driven service. Staff can set deadlines, monitor progress and receive submitted returns into a repository. Self-service audit options.

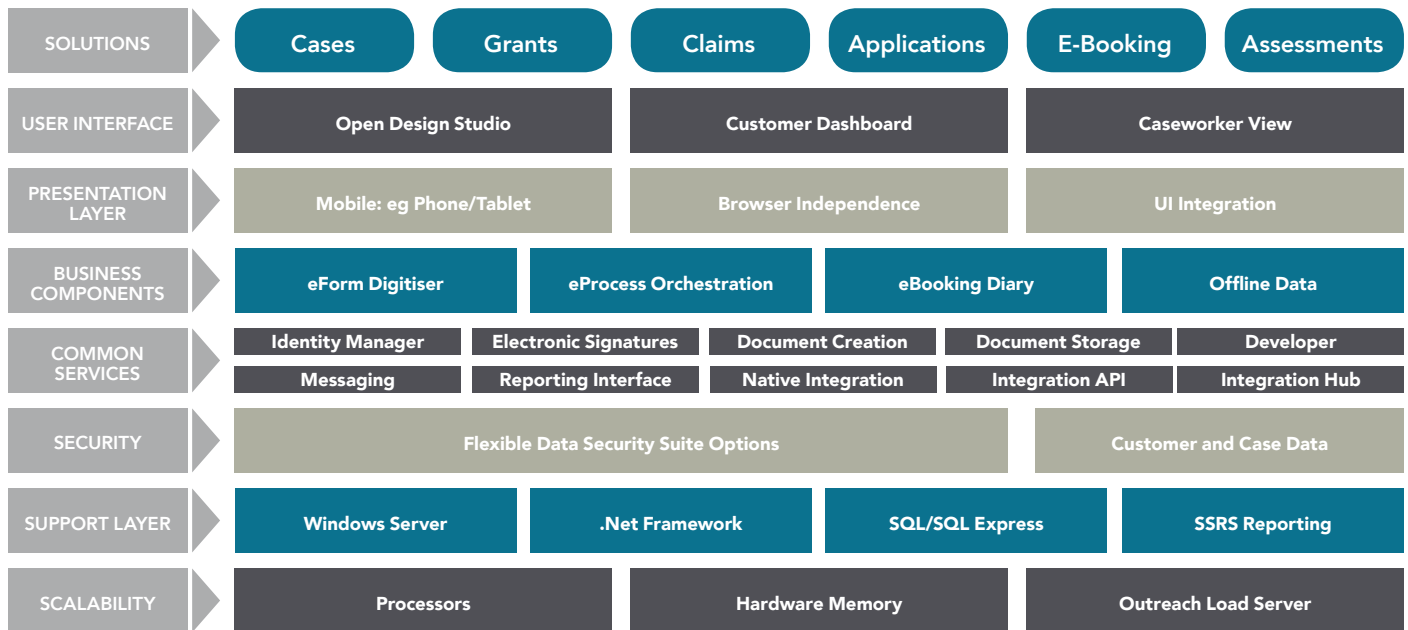
Claims: Guided claims web processes for staged payment or entitlement claims. Interactive-assisted completion with supporting evidence. Search and views improve staff claim checking process.

Grant applications: Automation of grant processes from initial application through approval and administration to ongoing management.



ARCHITECTURE

Outreach's architecture is broken down into eight areas:



SCALABILITY AND SUPPORT LAYERS

The product is developed using familiar Microsoft tools including C# and VB .NET and supported on Windows Server operating systems and virtual environments. It is "CMS-agnostic" and integrates with Open Source and proprietary Content Management Systems. Outreach Servers can be configured in load balanced configurations providing higher redundancy and scalable concurrency rates.

SECURITY LAYER

Security is delivered through 'out-of-the-box' security capabilities ranging from controlled access to sensitive data, strong encryption, identity management and protection from denial of service attacks.

COMMON SERVICES

- Document Creation – using information captured from users, data from linked data sources and predefined template text and graphics. DTP-style precision page layouts can be based on style sheets and layout rules for quick publishing. Information can be re-purposed to create different document views. XML is the native format and an extension module supports other formats including PDF, Word and Excel.
- Document storage – documents can be accepted in any format and stored with the associated case or task for retrieval. Uploaded documents can be forwarded with the task.
- Documents accepted over the internet can be checked for viruses.
- Developer – Allows development of extensions using familiar standards-based languages including VB compatible scripting or .NET based programming. A project library allows non-programmers to call on these services.
- Messaging – Distribution of information to users based on workflow rules. Allows alerts, confirmations, messages and acknowledgments using web, social networking, mobile and email.
- Co-browsing – customers can securely permit contact centre staff to view screens to provide telephone guidance.
- Reporting – Delivered by Microsoft SQL Server Reporting Services (SSRS).
- Integration – Front-end integration via CSS, HTML and Javascript support. Back-end integration via native support for open standard data exchange, API-based programmable extensions and product level integration mechanism supporting 40+ popular software products including CRM, ERP and Financials.

BUSINESS COMPONENTS

EFORM DIGITISER

Creates advanced wizard-driven screens for data collection with business rules that guide users through data entry ensuring business process compliance and navigation of tasks at each stage.

- Simple e-forms creation. Easy tailoring and auto-save to protect users who forget to save.
- Digital Services – Rapid prototyping and embedding of intelligent business rules allowing transformation of paper forms into true digital services.
- Seamless integration with content pages, including CMS authored ones.

EPROCESS ORCHESTRATION

Workflow-based process orchestration controls the flow of user actions, based on triggered events, periodic timed actions and business rules. Actions can be escalated and alerts and reminders triggered as required. It facilitates the collection of e-approvals and e-signatures and supports tight integration between e-forms, documents, workflow rules, processes and permissions.

EBOOKING DIARY

Enables 24/7 citizen self-service online booking and appointment. Provides a shared electronic diary accessible by authorised staff to make, move and cancel bookings. Administration and configuration is achieved through easy-to-use browser-based screens.

ARCHITECTURE CONT.

OFFLINE DATA

Structured, guided data collection over any mobile device, ensuring sensitive data can be entered at any location. 'Always-on' functionality and users can send data securely upon reconnection to a 3G, 4G or WiFi network. Other benefits include:

- Secure access and transmission: Data in transit is protected using up to 256-bit AES encryption. Data synchronisation is managed by the Outreach Identity Manager which can be configured to securely authenticate users.
 - Cross-platform capabilities enable BYOD and futureproof mobile device support.
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PRESENTATION LAYER

Simple matching of website branding, full disability discrimination support, WCAG/ AA Compliance. Responsive support for all common mobile and desktop browsers and screen sizes without the need for client software.

USER INTERFACE

Maximise ease-of-use and offer secure role-based permissions-based access to information.

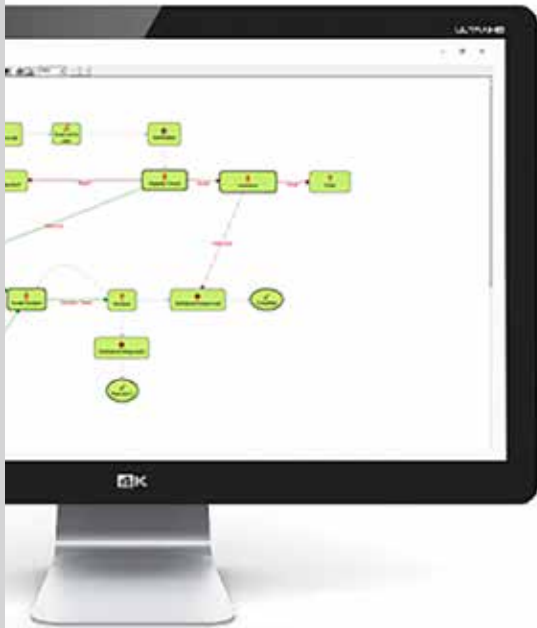
- Case worker workbench – Tracking/monitoring, archiving & retrieval of tasks. Searches for historical information, role-based access and Management progress overviews. Supports multi-agency working.
 - Customer dashboard – Allows personalised secure self-service access including progress tracking via web. Customers can monitor their own cases and histories.
 - Open Design Studio – Visual drag-and-drop design tool that empowers developers and non-developers alike with the flexibility to develop, design and update digital interactive services.
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SOLUTIONS LAYER

Use configurable implementations that enable a range of online and staff-facing applications including self-service appointment booking, online form presentation and data collection, service eligibility and application processing.



KEY OUTREACH PRODUCT AREAS - OPEN DESIGN STUDIO



Open Design Studio is Outreach's visual drag-and-drop design tool that empowers developers and non-developers the flexibility to develop, design and update digital interactive services. Open studio combines a 'Design once, use many times' capability that allows users to design case workflows, business

processes, document layouts, forms and templates once and re-use these for other pages, projects and devices types without needing to write code. Agile prototyping allows for fast delivery of working prototypes and provides built in inclusivity and access compliance.

BENEFITS:

- Non-programmers are empowered to make presentation changes and simple data configuration
- Delivery times can be cut by up to 50% vs bespoke software deployments

Key elements include:

- Graphical modelling of workflows and approval processes.
 - Theme design for managing look and feel, overall visual design with no CSS or HTML knowledge.
 - Digital service and form design for sophisticated, dynamic, multi-part, web-based forms that work across device types whether on or offline. Creation of screen layouts, including fields, guidance, navigation and links to external content and guidance, e.g. web service, database and document stores (EDRM & SharePoint).
 - Support for VB scripting, VB or C# .NET extensions.
- Design Studio provides three levels of access permissions, which enable multi-skilled teams to collaborate and boost productivity. This is supplemented by a "Safe-Mode" option which guards against team members introducing accidental errors.
 1. Developers – Unrestricted access to all application design features and code.
 2. Analysts – Add configurable logic and business rules – no code required.
 3. Contributors – edit text, elements of visual form styles and placement of fields.

KEY OUTREACH PRODUCT AREAS - DIGITAL SECURITY

Outreach provides a ISO27001-accredited 'security-built-in' model for organisations that demand high levels of security (IL3 and OFFICIAL levels) for online services, and complies with the HMG Security Policy Framework. Capabilities include controlled access to sensitive data, inbuilt password protection, digital

signatures, fine-grained access control, one-time security codes and single sign-on functions, as well as white and black listing and user auditing.

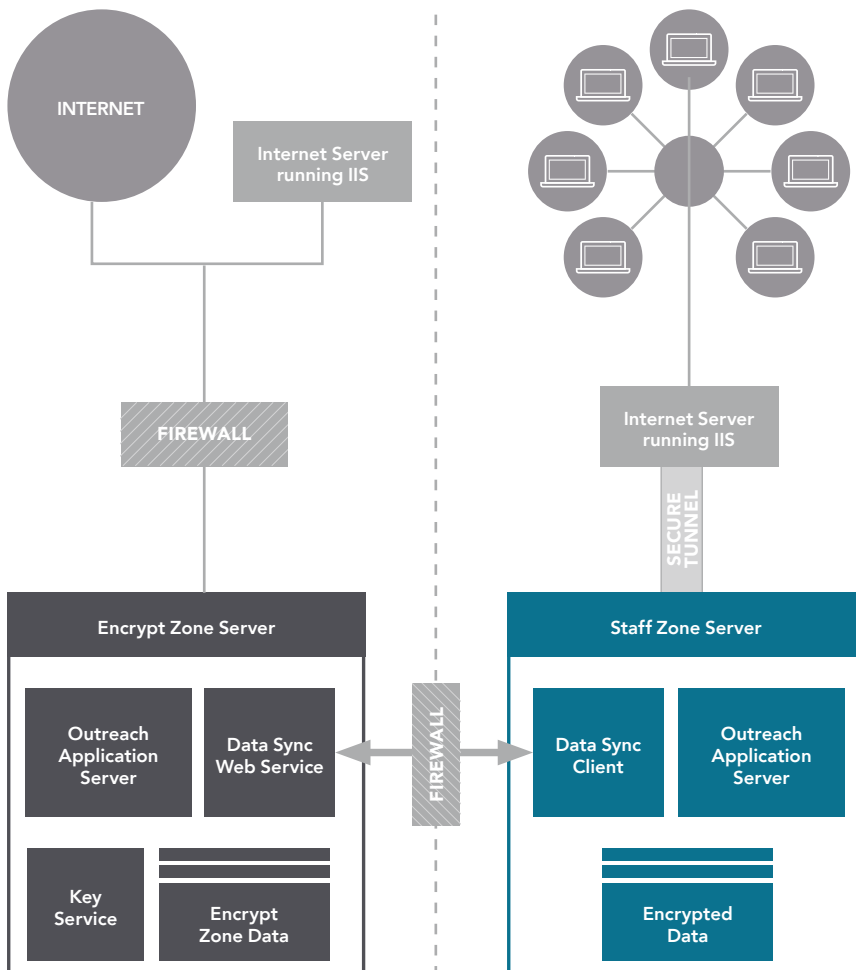
Architecturally, Outreach delivers inbuilt protection from Denial of Service attacks, strong encryption (AES 256), anti-virus and Firewall integration through ISAPI.

WHERE OUTREACH STANDS OUT

Role-Based Access – controlled access to sensitive data based on groups and individuals’ roles. Changes to authorised users and roles are audited. Administrative staff can view connection audits to track when users have made changes.

Identity Management – Configurable user profiles and secure roles based access control underpin a flexible authentication module that delivers permissions based access to functionality and data. Supports single-sign-on and federated environments in which it can either act as the identity provider or be configured as a service provider.

OUTREACH DUAL ZONE OPTION



Data protection and aggregation

– Outreach provides two unique capabilities that support DPA (Data Protection Act) compliance:

1. Dual Zone - dual server architecture option that allows internal staff, citizens and outside agencies to communicate across a single joined-up connection. This facilitates the mass collection of sensitive data across internet-facing and private zones which data aggregation rules would normally prevent.
2. Encrypt Zone – protects citizen data allowing individual database records associated with processes, saved forms and users to be individually encrypted, each with its own separate key.

BENEFITS:

- All Outreach implementations are delivered according to a hardening guide prepared by external CLAS consultants
- The Outreach GCloud e-Forms SaaS implementation has been awarded Pan Government Accreditation for the handling of OFFICIAL data by CESG

KEY OUTREACH PRODUCT AREAS – NETWORK AND SOFTWARE INTEGRATION

Management of data exchange and network integration with complex backend IT systems is a constant challenge for digital projects. Outreach offers a range of advanced integration capabilities that reduce digital deployment time and costs:

1. Native Integration for Open standard data formats

Design Studio features point-and-click techniques that support XML, PDF, CSV, text file, ADO/ ODBC compliant database, simple JSON/ RESTful, SOAP web services. Additionally, information lookup from ADO / ODBC compliant reference databases, such as MS SQL Server and Oracle and extract that data into Outreach.

2. Integration for Programmers with Outreach Developer Module

Outreach Developer module for use by customer programmers allows for programmable logic to be added using standard programming languages. This enables powerful custom integrations to be built. For example, there is a comprehensive API and complex JSON/ RESTful, SOAP web services can be architected to support an SOA architecture if desired.

3. Third party software integration

Outreach is based on SQL Server which enables it to leverage a huge number of third party software products through Toplevel's partnership with Scribe allowing ready-to-go integration to be achieved without programming. Scribe has built-in connectors for 3rd party software include Microsoft Dynamics CRM, SAP, Salesforce, Oracle, Netsuite, SharePoint and MySQL.

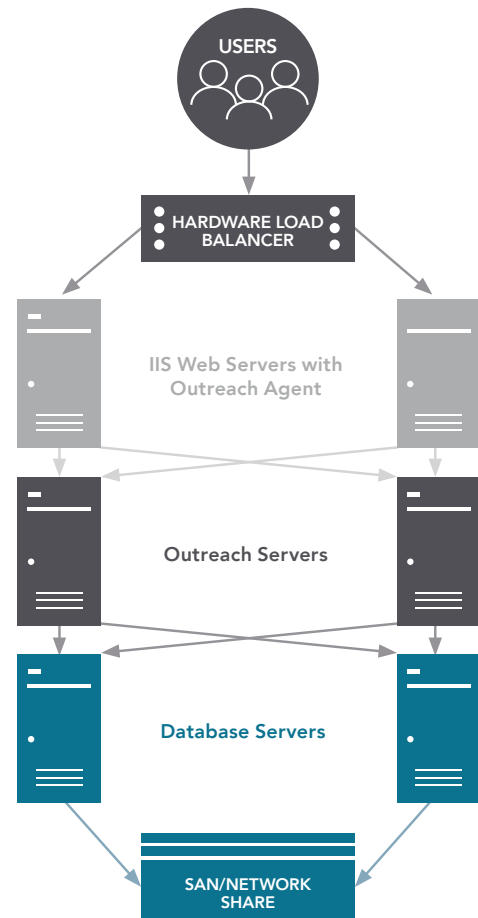
BENEFITS:

- Outreach minimises costly repurposing due to third party software updates

KEY OUTREACH PRODUCT AREAS – SCALABILITY FEATURES

Outreach is designed to be able to scale to support the largest citizen-facing public sector requirements and provides the ability for services to scale to tens of thousands of current sessions. It provides high availability and resilience.

- Deployments can support up to 1,200 concurrent users per server.
- Server load balanced configuration option provides higher redundancy and increased concurrency rates.



BENEFITS:

- Managed Outreach environments have recorded a 99.995% uptime record over the last 12 months

KEY OUTREACH PRODUCT AREAS – OPEN SOURCE EXTENSIONS

Outreach's extensible architecture makes it readily extensible by developers. Toplevel offers open source extension modules including a GOV.UK toolkit and encourages customers to share and reuse their extensions.

KEY OUTREACH PRODUCT AREAS – MOBILE DATA COLLECTION MODULE

'Out of the box' data collection from online and offline devices – users only need a browser. Online capability is browser and device independent and fully responsive. Offline capability is also fully responsive and supports a wide variety of HTML5 browsers including: Internet Explorer 10 or above, Firefox 3.5 or above and Google Chrome 4.0 or above, Safari on the Apple Macintosh and iPad and Dolphin on Android devices.



TWELVE REASONS

why Outreach would be great for your environment:

Outreach is:

1. **Low risk** – Ten years of development history and deployment in 50+ major public sector projects.
2. **Government compliant** – helps meet digital by Default Service Standards.
3. **Reliable and resilient** – Mature software / high availability capabilities have resulted in service uptime rates of 99.995%.
4. **Scalable** – Deployments can scale easily from 100s to 10,000s of concurrent users.
5. **Secure** – Compliant with HMG Security Policy Framework and IL3/ Official levels for online services. Toplevel's GCloud e-Forms service has recently been awarded Pan Government Accreditation by CESG.
6. **Fast and productive** – delivery times can be cut by up to 50% vs bespoke software deployments.
7. **Effective** at early delivery of working prototypes.
8. **Designed to avoid digital lock-in** – Empowers analysts and web designers to alter business processes, make presentation changes and simple data configurations to systems, without having in-depth HTML or programming skills.
9. **Reusable** – Design style, document layouts, business processes, case layouts, case workflows, templates and forms are created once and then reused across multiple projects and requirements.
10. **Supports all mobile and common browsers** out-of-the-box. Responsive to different screen sizes. WCAG/ AA Compliant.
11. **Simple to integrate** – Open standard support, programmable extensions and Scribe third party software allows faster integration with backend databases and security infrastructure.
12. **Open standards compliant** – Open standards built in. Support for open standard data exchange.



“

The Toplevel GCloud e-forms service was central to the success of our digital services transformation project... Toplevel has worked alongside us to meet and exceed the criteria and standards that emerged from the Government Digital Service in the course of the project.”

EMMA CHARLES, DIGITAL TRANSFORMATION PROJECT MANAGER
AT THE HOME OFFICE.



ABOUT 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.

We help organisations meet Digital by Default Service Standards quickly and securely while taking into account the complexity of IT environments, security infrastructure and data systems in which digital services need to operate.

We have proven skills, built over a decade's experience across more than 50 major public sector digital projects, to help rapidly develop and configure flexible, secure Agile based digital solutions.

Our skilled professional staff are experts in technology, including both Open Source and Microsoft tools. We use a best-of-breed approach, and have also invested substantial effort and talent in developing our own Outreach product that empowers analysts and web designers to develop and own digital projects with no risk of digital lock-in. We have been delivering Cloud SaaS services since 2005, so we're fully equipped to deliver our solutions as a managed Cloud service.

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