



NEW OUTREACH RELEASE ANNOUNCED

Equiniti Toplevel is pleased to announce a major update to our outreach digital case management platform; driven by our ongoing roadmap of improvements and customer requests

OUTREACH 15 HIGHLIGHTS

1. Open Design Studio is Cloud enabled

Open Design Studio is now deployable as a fully online suite of tools. This enables Toplevel to offer Outreach as a Cloud service – digital case management design studio with rapid on-boarding via the Cloud. And for customers preferring “on-premise” it saves the pain of deploying desktop tools to digital teams.

Multi-disciplinary teams can now build digital services faster and access them from any secure browser irrespective of their location with no software to install. Developers, business analysts and contributors can take advantage of enhanced low-code functionality to reuse digital project elements without the need for coding, using the enhanced graphical tools.

- Form Digitiser, Process Modeller and Document Theme Designer – all now delivered through an easy to use browser interface.
- New online cloud based self-study tutorials – self-help e-tutorials on how to best use our Form Digitiser and Process Modeller tools.

2. Case Modelling goes low-code

We’ve added two brand new code-free studio tools, so that digital teams are now empowered to build the entire case management service without code, right through from digital front-end to back end storage and staff-facing case management screens. This reduces build time and costs and provides multi-disciplinary digital teams with the tools to meet the demands of the next decade.

- Case Data Designer – models complex database structures visually, enabling customers to utilise any number of relational tables in their case management system. It offers the complete flexibility of data-model needed by one-of-a-kind national organisations.
- Case Workflow – models stages in the case lifecycle, to prompt staff to carry out necessary actions, so that systems that support and guide staff to follow correct procedures can be delivered rapidly, reducing training needs and preventing costly errors in live operations.

3. Updated Open Source Knowledgebase

Toplevel and our customers can share GDS compliant Digital by Default code for reuse, enabling other customers to adopt or modify completed digital elements. Knowledgebase contains; FAQs, code-free artefacts and open source code extensions. Recent additions include:

- SMS integration with GOV.UK Notify;
- A number of add-ons for Outreach e-Forms;
- Single sign-on for external applications. This code allows you to provide single sign-on throughout your site across different systems.

4. Document creation produces fully accessibility compliant PDF-A

Outreach gains a new PDF generation engine which generates PDF/A compliant PDFs providing screen-reader accessibility. Accessibility compliant PDFs are mandated for display on GOV.UK and Outreach can now generate them automatically for any digital service, saving a lot of project time.

PDF/A tags also enable better integration with document management systems and archives by making documents easy to search based on content.

5. Reusable code extensions – new plug-in architecture

We are passionate about low-code – but we’re equally committed to giving the best possible support to developers. Our goal is to ensure that customers are never locked-in or constrained when they choose Outreach. So for developers we have made Outreach even more extensible with a new plug-in architecture.

Outreach’s architecture enables .Net developers to create custom components or plug-ins, which have all the flexibility they need. Once plug-ins have been created, functionally complete components can be added to multiple pages with different configurations on each, with no additional coding and these can be re-used by other digital teams including non-programmers. This enables programmers to build extensions that can be shared and reused by designers and analysts.

6. Making sure our customers are ready for the General Data Protection Regulation (GDPR)

We’re pleased to announce that we also worked collaboratively with a customer to build our first Outreach Dual Zone implementation, proving Dual Zone’s capability for encrypting and segregating all data. Our government customers can be confident that they’ve chosen a government-strength solution; a critical element of digital service delivery.

FOR THE DIARY

From Summer 2017 Toplevel plans to move to a regular quarterly release schedule. Our aim is to ensure a more regular release of improvements.

New online development tools are in addition to existing desktop options and do not currently replace them, although support for the desktop tools will be phased out by the end of 2018.



OUTREACH 15 IN DETAIL

SECURITY

Dual Zone Implementation passes the test

HOW Secure data handling underpins public sector digital services and is key to DPA and GDPR compliance. To solve critical data aggregation and security issues, Toplevel released Dual Zone in 2016. This both encrypts data at rest and securely partitions customer and staff facing data. During H2 2016, we're pleased to announce that we

worked with a major government organisation to collaboratively build a Dual Zone implementation, including passing GDS Assessment.

BENEFIT Now that the first deployment is in place customers can be confident that Dual Zone will give them the government-strength data protection that they need.

USABILITY

Web-based Form Digitiser

HOW New open design studio tool, to digitise the entire customer journey, accessed entirely through the browser, enabling delivery teams to rapidly digitise both customer and staff journeys.

BENEFIT Rapidly model customer and staff journeys without code. Enables Alpha prototypes to be created quickly with no code, modified numerous times, and then taken forward to form the basis of the live solution, saving many man-weeks of project delivery effort. Code-free design, plus options to extend output programmatically.

MODULE Open Design Studio.

Web-based Graphical Process Modeller

HOW New graphical open design studio tool in the cloud, to model approval processes, supporting both serial and parallel approvals, complex conditions and integrations. Low-code with optional coded stages giving the ideal combination of speed and power.

BENEFIT All the power of our original desktop process modeller transformed into a modern web-based delivery tool, for rapid graphical process modelling in the Cloud. Code-free design, plus options to extend output programmatically.

MODULE Open Design Studio.

Web-based Roles Modeller

HOW Outreach Identity Manager module lies at the heart of the security model underpinning an Outreach deployment and it allows complete flexibility in modelling access rights for users through a roles based system of users and groups, in which digital teams can define the roles and departments their users need.

BENEFIT Control access to sensitive information simply through our new cloud based roles modelling tool. Code-free design tool.

MODULE Open Design Studio.

Web-based Document Theme Designer

HOW Rapidly create themes for documents, incorporating logos, fonts, font styles to reflect your own needs. Create as many themes as you want.

BENEFIT Outreach can use the themes to create fully accessibility-compliant PDFs, for your users to view or store in an indexed document management system for rapid access later on. Your design team can create and alter the themes in the Cloud, published changes instantly affect all linked documents, saving lots of effort repurposing documents if brandings change. Code-free design tool.

MODULE Open Design Studio.

Web-based Case Data Designer

HOW Case Data Designer is a drag and drop graphical modelling tool to model and publish the case data you want to store. It allows visual modelling to directly create tables, columns and relationships in the case database from simple, graphical models with NO additional coding. The case store table content and structure is fully definable with no constraints on the number or relational links between tables.

BENEFIT Rapidly model the data you need for your particular business – an essential capability for one-of-a-kind national organisations and all through code-free design.

MODULE Open Design Studio.

Web-based Case Workflow Designer

HOW Provide the ability to design a template workflow as a series of steps within a number of named stages. The template can then be copied to create specific workflows for different case types.

- Each step can include: Scheduled email; To do item; Attach document and Ad-hoc email.
- Emails sent by the workflow can incorporate merge fields from the case data. These are defined using tokens such as \$(ApplicantName) and \$(Employer.CompanyPostcode).
- This facility is supported by runtime capabilities which are separately described.

BENEFIT Model the entire lifecycle for each of your case types so that case workers are guided to follow correct processes, reducing training needs and preventing mistakes in operational service delivery. Code-free design tool.

MODULE Open Design Studio.

Making Open Design Studio Even Easier

HOW All studio tools are now accessed via a single menu page, which also leads to links to the e-tutorials for Form Digitiser and Process Modeller and links directly to the Knowledgebase of FAQ's and open source code extensions.

BENEFIT Design Studio users find it easy to access, and it promotes collaboration, reuse and the sharing of open source extensions.

MODULE Open Design Studio.



Existing web-based tools

HOW The Workbench Designer, Theme Designer and Bookings Designer as well as the Server Management Screens were already web-based tools. However, these have been graphically improved to make them easier to use and consistent with the new Open Design Studio.

BENEFITS Great user experience for digital delivery teams.

MODULE Open Design Studio.

Case Management

HOW Cases have stages. Design the stages to suit the particular case type, e.g. you might have; Opened, Awaiting Assessment, Approved, Paid, Closed. There can be multiple case types too. Within stages are steps and Outreach keeps track of the activity at each step including:

- Status
- Date / time done
- Done By (the ID of the person who did it)
- Alert flag
- Summary
- Notes

Ad-hoc steps added by the case worker: In addition to carrying out the pre-defined step in the workflow, users may add their own steps. A user would use this, for example, to add an ad-hoc file note, to send an impromptu email or to upload a pertinent document. Users are also able to add scheduled steps to the case workflow – for example a scheduled To Do step.

BENEFIT Quickly deliver flexible, powerful case management.

MODULE Outreach Server.

INTEGRATION

Web API extended

HOW Add Task API stores externally initiated tasks in Outreach standard XML.

BENEFIT Seamless integration when third party developed systems are used to work in conjunction with Outreach to deliver a single solution.

MODULE Outreach Developer.

Accessibility compliant PDF document generation

HOW When Outreach generates a PDF document based on the new Document Themes it's now "tagged". The PDF tag tree reflects the structure of the document, and it's this structure that assistive technologies like screen readers use to navigate the document.

BENEFIT These tags can be used both by assistive technologies like screen-readers and also by document management systems for indexing and searching documents.

MODULE Outreach Server.

FOR DEVELOPERS

New Plug-in Framework – add your own reusable front-end code

HOW Outreach's new plug-in architecture enables a .Net developer to program custom components or plug-ins, which can be reused by form designers in Form Digitiser without any coding experience. The plug-ins are intended to program front-end extensions. Potential examples are:

- Summary plug-in, display a summary page of data collected in the user journey;
- Image viewer;
- Document thumbnail viewer.

Powerful Plug-ins

- Plug-ins can be made configurable, e.g. so that the form designer can choose which screen fields they act on.
- Plug-ins can access the extensive Outreach API.
- Plug-ins can detect events, such as a button click.
- Plug-ins can communicate with each other.
- Plug-ins can invoke dialogs.

BENEFITS Developers can build reusable .NET plug-ins, which flexibly extend Outreach. These plug-ins can then be reused on screens without further code, allowing developers to create reusable components that form designers, without coding experience, can add to a form.

NOTE: The two other methods of coding front-end extensions are VB.NET script and .NET assemblies built with Visual Studio. These continue to be fully supported methods, as do .NET DLL's for coding integrations and other functionality.

MODULE Outreach Developer.



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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