

West Virginia Information Technology Summit 2009

Leveraging Microsoft Dynamics CRM as an Enterprise Development Platform

“How to Stay Ahead of the Alligators”





*CIO or IT
Manager*

Customers

Organization Profile

Pennsylvania Office of Attorney General



- OAG has been in existence since 1643.
- Independently-elected office since 1980.
- Chief law enforcement officer of the Commonwealth
 - *Law enforcement & adjudication*
 - *Civil Law, Criminal Law & Public Protection*
- Approximately 900 employees & 22 locations

Impetus for CRM

- OAG interacts with many internal and external parties.
- Interaction occurs through multiple touch points.
- Expectation for timely acknowledgement and follow-up.
- Need to ensure issues are:
 - *Logged and tracked*
 - *Routed to the correct area for attention*
 - *Completed*
- Solution: Implementation of OAG 311 System
 - *A single point of reference for managing all OAG interactions*
 - *Create a registry that contains all players the OAG deals with*
 - *Integrate with other line of business applications*

OAG 311 - Phase 1 Overview

Touch Points



Mail



Walk-In



Telephone



Email



Fax



E-Forms



Contact Recorded

February 08						
M	T	W	T	F	S	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

Due Date Set



Auto-Response



Microsoft CRM



OAG Registry



Routed for Action



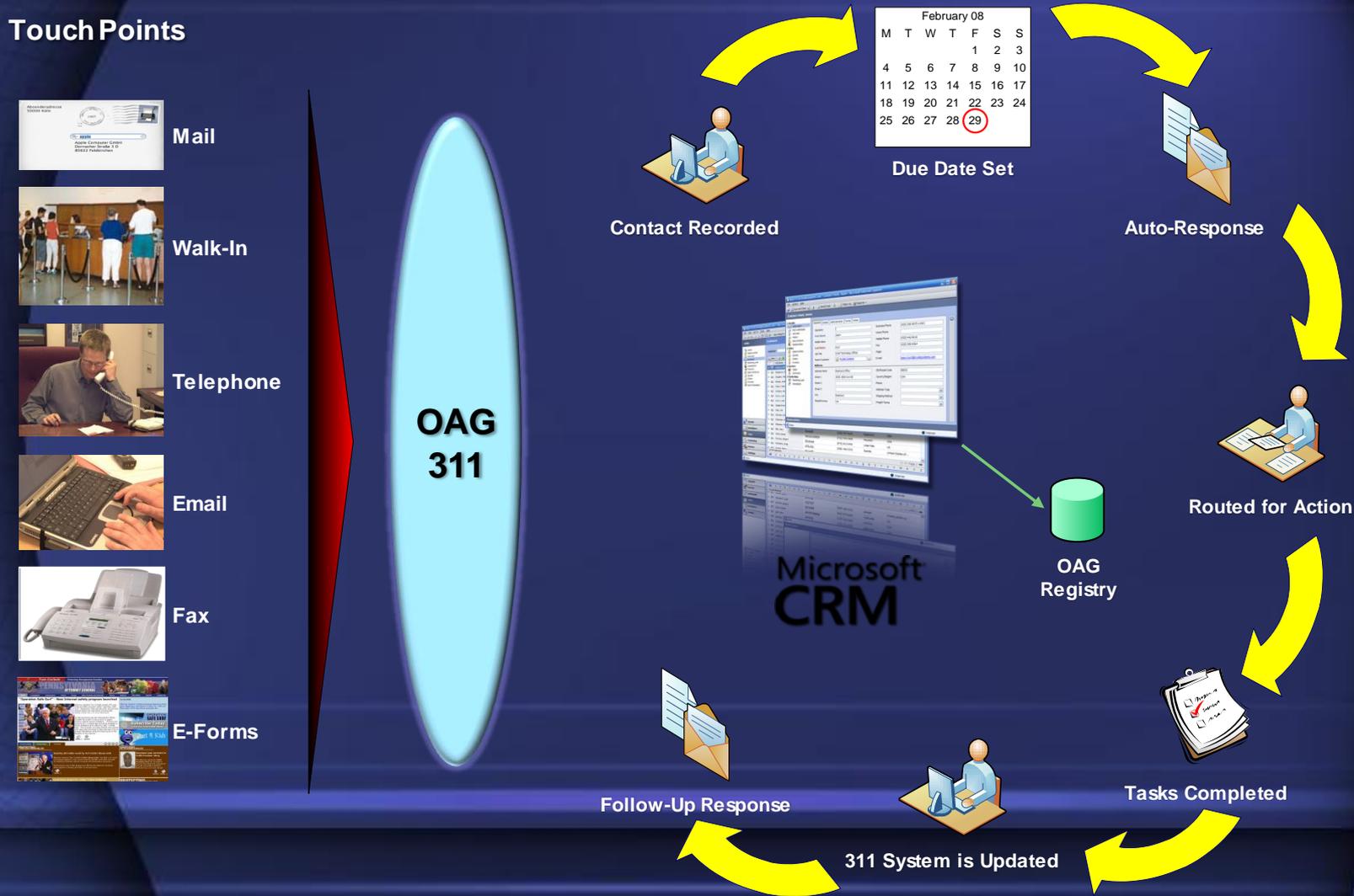
Tasks Completed



311 System is Updated



Follow-Up Response



Why Dynamics CRM?

- OAG already standardized on Microsoft products
- Ability to leverage Enterprise Agreement
- Dynamics CRM integrates well with
 - *Office*
 - *Exchange*
 - *SharePoint*
- Dynamics CRM provides a rich development platform and workflow to handle business requirements

XRM as a Development Platform

- OAG re-built three Intel applications using XRM:
 - *Megan's Law Audit*
 - *CHRIA Audit*
 - *ChildLine Audit*
- Previously developed in C#.NET.
- Required approximately 10 weeks to build.
- Using XRM as the development tool...
 - *Rebuilt all three applications in less than 1 day.*
- Plus...
 - *XRM provided a much better interface.*
 - *Improved functionality.*

OAG Vision for XRM

XRM is the OAG development platform of choice.

- Core features lend themselves to how the OAG works.
- Robust applications can be built and deployed quickly.
- Minimal ramp-up time for staff.
- XRM can be customized for more complex applications.

OAG XRM Phased Approach

Phase 1

- Mail Log
- Aggressive Citizens
- Legislative Contacts
- Do Not Call Integration

- Special Features:
 - Auto Letter Generation
 - Mail Merge

Phase 2

- Development Platform
 - New Applications
 - Re-Writes
- Integration w/LOB Apps

- Special Features:
 - Advanced Workflow
 - Enhanced Reporting
 - Geospatial Integration
 - Citizen Self-Service

Phase 3

- 311 Expansion to Field Offices
- Additional Touch Points
 - Telephone
 - Web-Forms

- Special Features:
 - Use of Dynamics Accelerators

XRM Applications in the OAG

1. Education & Outreach (Includes Self-Registration & Event Scheduling)
2. Safety & Security
3. Victim Reference
4. Coroner Management
5. Case Expense Tracking
6. Intelligence Section Audits
7. Task Force Overtime
8. District Attorney Expense Tracking
9. Federal Asset Forfeiture
10. Home Improvement Contractor Registration
11. Tech Services Inventory
12. IT Change Management/Disaster Recovery
13. Do Not Call Registration
14. Applicant Management System
15. Employee Provisioning/De-Provisioning
16. Contract Match
17. Legal Review
18. Drug Prosecution & Statistics

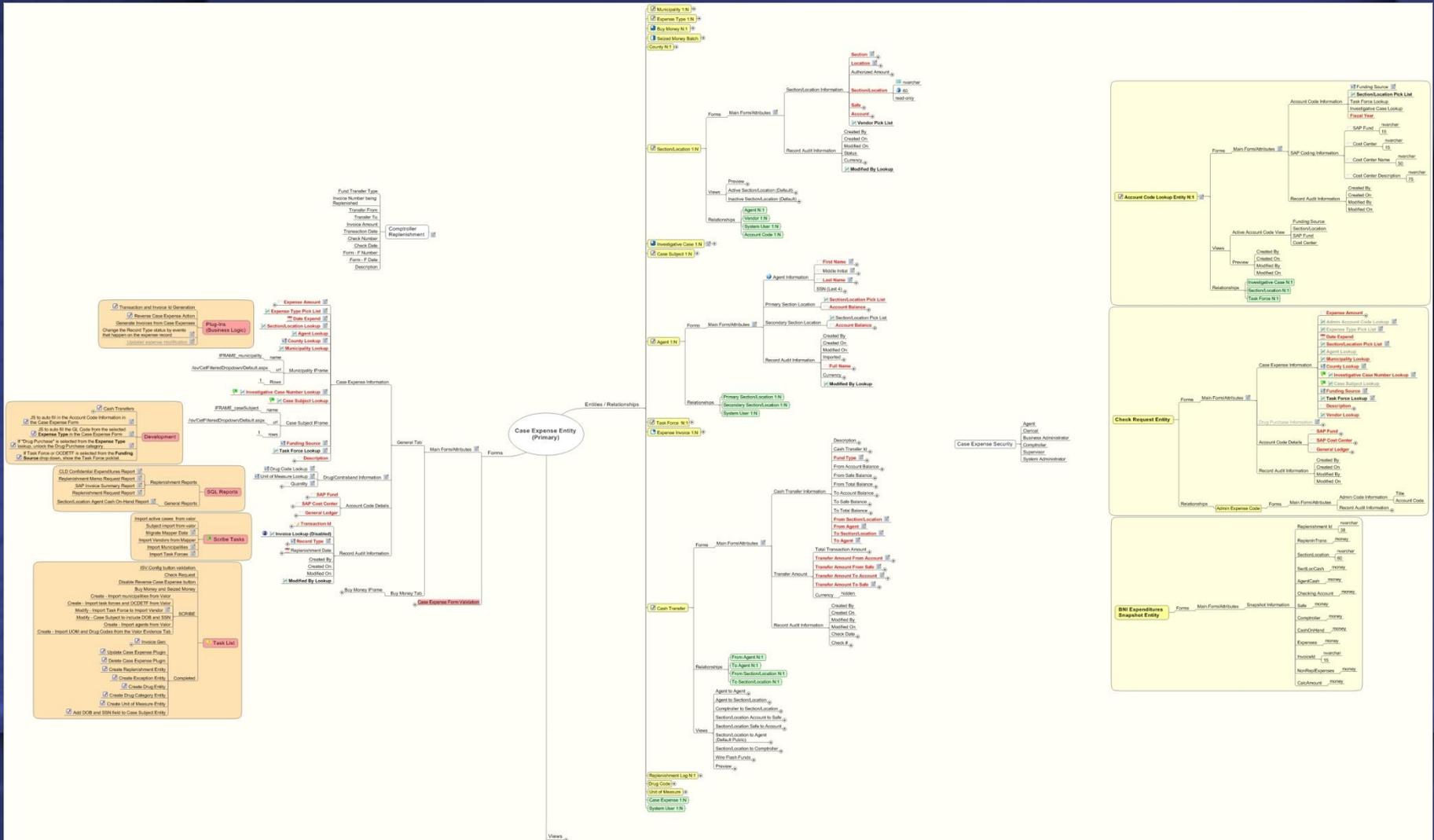
Plus an additional 25 applications are scheduled for completion by June 30, 2010.

Building Applications in XRM

- Starting Point: System Mind Map.
 - *Entities/Relationships*
 - *Views*
 - *Forms*
 - *Reports*
- Map provides rational approach for dividing work among team.
- OAG uses a combination of out of the box functions and customized features.
 - *Most of our applications involve some customization.*
 - *The major entities that we use are contacts, accounts and currency.*
- Many plug-ins and custom work flow have been developed to meet OAG-specific business requirements.
 - *Plug-ins that handle creating, updating, and deleting records.*
 - *Enhanced security requirements (e.g. ability for a specific user to only delete certain records).*
 - *Business validation rules (e.g. ensuring the correct case subjects are on a selected case).*
 - *Plug-ins that handle financial transactions (e.g. saving a case expense and deducting the amount from the agent's checking account).*
 - *Plug-ins that provide auto-numbering functionality for custom entities.*
- Customization is done with several tools:
 - *C#. Net 2008, ASP.Net, .Net Framework 3 + 3.5, CRM SDK, SQL Server Reporting Services*
- Looking to begin using XRM Accelerators

Building Applications in XRM

XRM Application Mind Map



XRM Accelerators

- Free of Charge add-on solutions developed for Dynamics by Microsoft customers and partners.
- Provide building blocks for a range of XRM-based applications.
- Supplied with full source code so they can be extended further to meet specific business requirements.
- OAG is looking at the following accelerators:
 - Analytics
 - Social Networking
 - Portal Integration
 - eService
 - Event Management

XRM Applications – Examples

- Case Expense Tracking
- Education & Outreach
- Home Improvement Contractor Registration
- HR Applicant/Personnel System
- Information Technology Section Management

Case Expense Tracking System

- Used by the OAG Bureau of Narcotics Investigation, Organized Crime Section and Gaming Section.
- Repository for expenditures related to a case and/or subject.
- Tracks case expenses, invoices, replenishment of advancement monies, cash transfers, and buy/seized money.
- This application required several custom-built plug ins to handle business rules as well as ISV's to extend CRM functionality.
- **Functions Shown:**
 - Entering Buy Money Prior to a Drug Purchase & Printing a Buy Money Report
 - Entering a Case Expense and Associating It With Buy Money
 - Associating Seized Money with Buy Money
- **Effort:**
 - 1 full-time resource initially, increased to 2 full-time resources
 - 6 months

Case Expense Tracking System

1. Entering Buy Money & Printing a Buy Money Report

The screenshot displays the Microsoft Dynamics CRM interface for Case Expense Tracking. The main window shows the 'Buy Money' section with a table of records. A red arrow points to the 'New' button, and another red arrow points to the 'Buy Money' option in the left navigation pane.

Denomination	Serial Number	Agent	Investigative Case	Case Expense
10	123456789	Laurito, Aaron		
100	a67984a98746543	Laurito, Aaron		
100	6666666	Rodriguez, Edward	00500000197	
20	123	Avery, James	00200003345	
20	2345678910	Muscarello, Anthony		
20	321654987	Laurito, Aaron		
20	999999999	Rodriguez, Edward		
5	c3520622356c	Laurito, Aaron		
5	06987432113657a	Laurito, Aaron		
5	123456789012345	Laurito, Aaron		
5	3434343434333	Troutner, Henry	BN3000109	
50	326859870078966	Laurito, Aaron		

Case Expense Tracking System

1. Entering Buy Money & Printing a Buy Money Report

Microsoft Dynamics CRM - Windows Internet Explorer

http://crmdev.ag.gov/CET/loader.aspx

File Edit View Favorites Tools Help

MSN.com Home - Applications Microsoft Dynamics CR...

Case Expense Tracking - DEVELOPMENT Kimberly Tiller Case Expense Tracking

New Activity - New Record - Go To - Tools - Advanced Fnd Help

Transactions

Case Expense

- Case Expenses
- Expense Invoices
- Mapper Archives

Administrative

- Cash Transfers
- Check Requests

Transaction Logs

- Replenishment Logs

Money Tracking

- Buy Money
- Mapper Buy Money
- Seized Money Batches

Buy Money

Search for records View: Active Buy Money

New Available Buy Money Report More Actions

Denomination	Serial Number	Agent	Investigative Case	Case Expense
10	123456789	Laurito, Aaron		
100	EG4441332D	Jenkins, Daniel		
100	EC4455655E	Jenkins, Daniel		
100	EC4455655G	Jenkins, Daniel		
100	EC4455655Y	Jenkins, Daniel		
100	EC4455655K	Jenkins, Daniel		
100	a67984a98746543	Laurito, Aaron		
100	6666666	Rodriguez, Edward	0050000019Z	
20	123	Avery, James	00200003345	
20	EN4455655E	Jenkins, Daniel		
20	CC4455655E	Jenkins, Daniel		
20	LC4455655E	Jenkins, Daniel		
20	2345678910	Muscarello, Anthony		
20	321654987	Laurito, Aaron		
20	999999999	Rodriguez, Edward		
5	c3520622356c	Laurito, Aaron		
5	06987432113657a	Laurito, Aaron		
5	123456789012345	Laurito, Aaron		
5	34343434343333	Troutner, Henry	BN3000109	
50	326859870078966	Laurito, Aaron		

1 of 20 selected. Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Done Local intranet | Protected Mode: Off 100%

Case Expense Tracking System

1. Entering Buy Money & Printing a Buy Money Report

The screenshot displays the Adobe Acrobat Professional interface. The main content area shows a PDF document titled 'Buy Money Report'. The report includes the following information:

Buy Money Report Tuesday, 29 September 2009 12:04

Agent: Sassano, Anthony

Available Buy Money

Denomination	Serial Number	Buy Money
20	EB53838670E	
20	EB53838677E	
20	EB53838688E	
20	EB53838690E	
20	EB53838691E	
20	EB53838699E	

Available Buy Money Summary

Denomination	Count	Value
20	6	\$120
Totals	20	\$120

Case Expense Tracking System

2. Associating Buy Money with a Drug Purchase Case Expense

The screenshot displays the 'Case Expense: New' form in a Windows Internet Explorer browser window. The form is divided into several sections:

- Case Expense Information:** Includes fields for Agent, Section/Location, Investigative Case, Case Subject, Expense Type (set to 'Drug Purchase'), Expense Amount, and Description.
- Drug/Contraband Information:** Includes fields for Drug Code and Quantity. A red box highlights this section and the 'Look for: Drug Code' dropdown menu.
- Account Code Details:** Includes fields for SAP Fund and General Ledger (set to 6392110).
- Record Audit Information:** Includes fields for Transaction Id, Record Type (set to 'Unreplenished'), Created By, Modified By, and Reverse Case Expense.
- Form Assistant:** Includes a dropdown for Expense Type and a 'Look for: Expense Type' dropdown menu.

The 'Look for: Drug Code' dropdown menu is open, showing a search bar and a list of drug codes: BNI, Drug/Gun Violence, Outside Source, Task Force, and OCDEF. The 'Look for: Unit of Measure' dropdown menu is also open, showing a search bar and a list of units: Dosage Units, Fluid Ounce, Gallon, Gram, Kilogram, Liter, Migration-Unknown, Milliliter, Number of Plants, and Ounce.

The status bar at the bottom indicates 'Status: New' and 'Local intranet | Protected Mode: Off | 100%'.

Case Expense Tracking System

2. Associating Buy Money with a Drug Purchase Case Expense

The screenshot displays the 'Case Expense: New' form in a Windows Internet Explorer browser window. The form is divided into several sections, with red boxes and arrows highlighting the association between the 'Drug Purchase' expense type and the 'SAP Fund' field.

Case Expense Information

- Agent *
- Section/Location *
- Investigative Case *
- Case Subject *
- Expense Type * (Drug Purchase)
- Expense Amount * \$
- Description *
- Date Expend *
- County *
- Municipality *
- Funding Source *

Drug/Contraband Information

- Drug Code
- Quantity
- Unit of Measure

Account Code Details

- SAP Fund *
- General Ledger * (6392110)
- SAP Cost Center *

Record Audit Information

- Transaction Id *
- Record Type (Unreplenished)
- Created By
- Modified By
- Reverse Case Expense
- Invoice
- Replenishment Date
- Created On
- Modified On

Form Assistant

- Expense Type
- Look Up Records
- Look for: Expense Type
- Search for records
- Administrative
- Case Expense
- Contraband
- Drug Purchase
- Informant Expense
- Prescription/Pharmaceutical
- Theft

Status: New

Done

Local intranet | Protected Mode: Off

100%

Case Expense Tracking System

2. Associating Buy Money with a Drug Purchase Case Expense

Case Expense: CE00000398 - Windows Internet Explorer

Save and Close Send E-mail Follow Up Reports Reverse Case Expense Actions Help

Case Expense: CE00000398
Information

Details: Information Activities History Workflows Seized Money

General Buy Money Case Expense Notes and Attachments

Case Expense Information

Agent *	Jenkins, Daniel	Date Expend *	9/18/2009
Section/Location *	BNI - Lemoyne	County *	DAUPHIN
Investigative Case *	BN3006409	Municipality *	Bachmanville
Case Subject *	Doe "B"	Funding Source *	BNI
Expense Type *	Drug Purchase		
Expense Amount *	\$ 500.00		
Description *	INF - ECSTACY		

Drug/Contraband Information

Drug Code *	Designer Drug	Unit of Measure	Gram
Quantity *	16.500		

Account Code Details

SAP Fund *	6000909000	SAP Cost Center *	1467321000
General Ledger *	6392110		

Record Audit Information

Transaction Id *	CE00000398	Invoice	
Record Type	Unreplenished	Replenishment Date	
Created By	Kimberly Tiller	Created On	9/24/2009
Modified By		Modified On	9/24/2009
Reverse Case Expense			

Form Assistant

Agent

Look Up Records

Look for: Agent

Search for records

- Acri, Gregory
- Adams, Albert
- Adams, Amy
- Albeck, Timothy
- Ansel, Francis
- Antinucci, Jeffrey
- Antonucci, Chris
- Applegate, William
- Armoni, Ronald
- Aronica, Gregory

Page 1

Status: Active

Local intranet | Protected Mode: Off 100%

Case Expense Tracking System

3. Associating Seized Money with Buy Money

Seized Money Report Tuesday, 29 September 2009 02:23

Batch Id: SM000005
Case #: BN3006409

Agent: Jenkins, Daniel
Defendant: Doe "B"

All Seized Funds

Denomination	Serial Number
20	EC555555L
100	EC445565E
100	EC445565G
100	EC445565K

Summary of Seized Funds

Denomination	Count	Value
20	1	\$20
100	3	\$300
Totals	4	\$320

Matching Funds

Denomination	Serial Number	Transaction Id	Buy Date
100	EC445565E	CE00000398	09/18/2009
100	EC445565G	CE00000398	09/18/2009
100	EC445565K	CE00000398	09/18/2009

Summary of Matching Funds

Denomination	Count	Value
100	3	\$300
Totals	3	\$300

Education & Outreach System

- Used by the OAG Executive Office – Education & Outreach Office.
- Externally facing component allows entities to request speakers and/or collateral material for education and outreach events.
- Internal component used to plan, schedule and coordinate all activities related to events and to capture post-event data.
- Data is presented in a dashboard.
- Effort:
 - 1 full-time resource
 - 1 week (*Note: Delivered 1 month ahead of schedule*)

Education & Outreach System

Web-Based Event Request Form

Registration - Windows Internet Explorer
http://www.attorneygeneral.gov/outreachregistration/

File Edit View Favorites Tools Help

Registration

County

Available Equipment
Select all the equipment that is available for the presenter to use at the entered location.

Projector DVD Player Sound System
 Screen Microphone

Request Material(s)
Select all the materials that you are interested in receiving.

Operation Safe Surf DVD
 Operation Safe Surf Mousepad
 Operation Safe Surf Poster
 Sticks and Stones (Cyberbullying) DVD
 Think Again (gun violence) DVD
 Truth and Choices (drug abuse prevention) DVD

Request Event(s)
Select all the events that apply.

Operation Safe Surf ID Theft Gun Violence
 Truth & Choices Bullying Senior Crime Prevention
 Misc Presentation

Event Scheduling
Please select your scheduling preferences in order of availability. Note that the first day you can schedule is 14 days from todays date.

First Date/Time Preference Second Date/Time Preference Third Date/Time Preference
None None None

Fourth Date/Time Preference
None

Submit Request

Done Local intranet | Protected Mode: Off 100%

Education & Outreach System

Internal Event Scheduling & Coordination

http://crm.ag.gov/?id={535A26DF-DBA9-DE11-9C66-0050569F5001}&etc=10031 - Public Outreach Event: - Windows Internet Explorer

Save and Close | Send E-mail | Follow Up | Run Workflow... | Actions | Help

Public Outreach Event: 7th Street Elementary

Information

Details:

- Information
- Activities
- History
- Workflows
- Outreach Materials

Administrative Event Scheduling

SA Assigned: Surma, D. | Second SA Assigned: []

Actual Start Date/Time: 12/5/2008 1:00 PM | Actual End Date/Time: 12/5/2008 2:00 PM

AG Attending: | Actual Attendance: 238

Materials Sent: []

Administrative Comments: Grades K-5 from 1:00-2:00 p.m. (about 100 kids)

General

Name *: 7th Street Elementary

Type: [] | Sponsor: 7th Street Elementary

Audience: Students | Specific Audience: Grades K-6

Expected Attendance: 120 | Materials Only:

Table Display:

Additional Comments: []

Location

Address 1: 310 7th Street | State: Pennsylvania

Address 2: [] | Zip: 16323

Address 3: [] | County: Venango

City: Franklin

Primary Contact

Contact's Name: Dr. James Ruby | Cell/Other Phone: []

Title: Principal | Phone: (814) 432-5562

Email Address: ruby@fasd.k12.pa.us

Event

OSS	<input checked="" type="checkbox"/>	Truth & Choices	<input type="checkbox"/>	ID Theft	<input type="checkbox"/>
Misc Presentation	<input type="checkbox"/>	Gun Violence	<input type="checkbox"/>	Bullying	<input type="checkbox"/>
SCPU	<input type="checkbox"/>				

Equipment

Status: Active

Done | Trusted sites | Protected Mode: Off | 100%

Education & Outreach System

Internal Outreach Event Summary

http://crm.ag.gov/ - Microsoft Dynamics CRM - Windows Internet Explorer

OAG 311 System Himes, Derek
OAG 311 System

New Activity - New Record - Go To - Tools - Advanced Find Help

Workplace **Public Outreach Events**

My Work
Activities
Reports

Citizen Entities
Accounts
Contacts

Extensions
PPD Outreach Programs
Public Outreach Programs

Public Outreach
Dashboard
Public Outreach Events
Public Outreach Registra...
Outreach Materials

Personalize Workplace ...

Workplace
Home Improvement
Service
Settings
Resource Center

Search for records **View:** Active Public Outreach Events

Name	Sponsor	County	AG Attending	SA Assigned	Actual Start Date/Time	Actual End Date/Time	Expected Attendees
2008 Ombudsmen Enrichm...	2008 Ombudsmen En...	Dauphin	No	Himes, Derek	3/10/2008 2:45 PM	3/10/2008 4:15 PM	50
2008 Safe Schools Conf.	2008 Safe Schools Co...	Dauphin	No	LeCadre, Craig	5/6/2008 9:00 AM	5/6/2008 12:00 PM	
2nd Presbyterian Church	2nd Presbyterian Chu...	Venango	No	Surma, D.	6/16/2008 3:00 PM	6/16/2008 12:00 AM	50
7th Street Elementary	7th Street Elementary	Venango	No	Surma, D.	12/5/2008 1:00 PM	12/5/2008 2:00 PM	120
A. L. Wilson Elementary S...	Albert Gallatin School ...	Fayette	No	Shaheen, Richard	11/16/2009 9:15 AM	11/16/2009 10:15 AM	271
Abington Comm. Library	Abington Community ...	Lackawanna	No	LeCadre, Craig	6/24/2008 6:30 PM	6/24/2008 7:30 PM	30
Abington Heights Civic Lea...	Abington Heights Civi...	Lackawanna	No	McCoy, Mary	4/10/2008 7:00 PM	4/10/2008 8:00 PM	40
Abington Heights MS	Abington Heights Mid...	Lackawanna	No	LeCadre, Craig	5/9/2008 8:00 AM	5/9/2008 12:00 PM	900
Abington Jr./Sr. High Scho...	Rep. Josh Shapiro	Montgomery	Yes	Thomas, Claude	5/18/2009 1:30 PM	5/18/2009 2:30 PM	600
Abington Police Training C...	Domestic Violence Tra...	Montgomery	No	McCoy, Mary	12/9/2009 6:00 PM	12/9/2009 8:00 PM	
Abington YMCA	Abington YMCA	Montgomery	No	Thomas, Claude	7/28/2009 6:00 PM	7/28/2009 7:15 PM	75
Abington YMCA	Abington YMCA	Montgomery	No	LeCadre, Craig	7/14/2009 6:00 PM	7/14/2009 7:15 PM	75
Abundant Life Baptist Chu...	Abundant Life Baptist...	Washinton	No	Neal, Fred	10/11/2008 6:30 PM	10/11/2008 9:00 PM	
Abundant Life Baptist Chu...	Abundant Life Baptist...	Washinton	No	Neal, Fred	10/12/2008 7:00 PM	10/12/2008 7:30 PM	
ACMH Hospital	ACMH Hospital	Armstrong	No	Surma, D.	11/16/2009 12:00 AM	11/16/2009 12:00 AM	200
Adams County 4H Club	Penn State Cooperati...	Adams	No	LeCadre, Craig	7/21/2009 1:30 PM	7/21/2009 3:30 PM	45
Adams County Children's ...	Adams County Childr...	Adams	No	LeCadre, Craig	4/28/2009 2:00 PM	4/28/2009 3:00 PM	30
Adams County Christian A...	Gettysburg School Di...	Adams	No	LeCadre, Craig	10/5/2009 1:50 PM	10/5/2009 8:00 PM	70
Adlai Stevenson Element.	Adlai Stevenson Elem...	Allegheny	No	Neal, Fred	2/20/2008 11:30 AM	2/20/2008 8:00 PM	422
Aerial Communications	(technology based co...	Bedford	No	LeCadre, Craig	3/19/2009 6:30 PM	3/19/2009 7:30 PM	35
Akron Grace Evangelical C...	Akron Grace Evangeli...	Lancaster	No	LeCadre, Craig	4/1/2009 7:00 PM	4/1/2009 8:00 PM	35
Akron Grace Evangelical C...	Akron Grace Evangeli...	Lancaster	No	LeCadre, Craig	4/8/2009 7:00 PM	4/8/2009 8:00 PM	25
Albany Elementary	Kutztown Area Schoo...	Berks	No	McCoy, Mary	11/21/2008 12:00 PM	11/21/2008 1:00 PM	50
Albert Gallatin High School	Albert Gallatin School ...	Fayette	No	Shaheen, Richard	9/21/2009 7:30 AM	9/21/2009 9:30 AM	700
Albert Gallatin High School	Albert Gallatin S.D.	Fayette	No	Shaheen, Richard	9/22/2009 7:30 AM	9/22/2009 9:30 AM	700
Albert Gallatin North Midd...	Albert Gallatin North ...	Fayette	No	Neal, Fred	11/5/2008 1:30 PM	11/5/2008 8:00 PM	500
Albert Gallatin South Midd...	Albert Gallatin South ...	Fayette	No	Neal, Fred	11/5/2008 9:30 AM	11/5/2008 10:30 AM	450
Albion Area Lions Club	Albion Area Lions Clu...	Erie	No	Surma, D.	6/15/2009 7:00 PM	6/15/2009 8:30 PM	50
Albright College	Albright College	Berks	No	Thomas, Claude	11/6/2008 5:00 PM	11/6/2008 7:00 PM	
All Saints School	All Saints School	Fayette	No	Neal, Fred	10/23/2008 12:00 PM	10/23/2008 1:40 PM	72
Allegheny College	Allegheny College	Crawford	No	Surma, D.	2/22/2010 8:00 AM	2/22/2010 12:00 PM	50
Allegheny College	Allegheny College	Crawford	No	Surma, D.	4/8/2009 11:00 AM	4/8/2009 12:00 PM	350
Allegheny Lutheran Social ...	Allegheny Lutheran S...	Blair	No	Shaheen, Richard	9/18/2009 10:00 AM	9/18/2009 12:00 PM	110

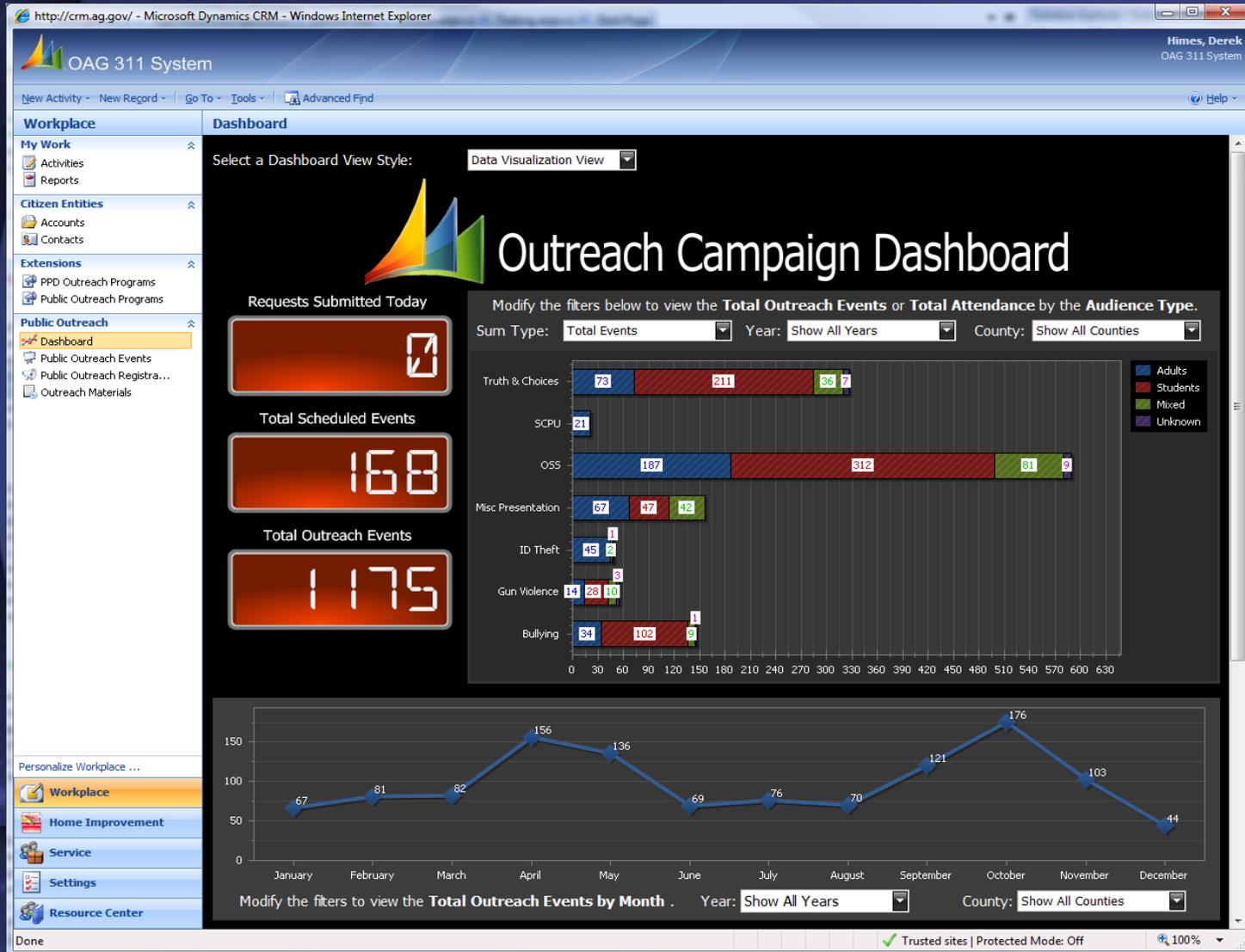
1 of 250 selected. Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Trusted sites | Protected Mode: Off 100%

Education & Outreach System

Outreach Dashboard



Home Imp. Contractor Reg.

- Law requiring all home improvement contractors doing over \$5,000 worth of business in Pennsylvania to register with the OAG – Bureau of Consumer Protection.
- Web-based form allowing contractors to register on-line and pay \$50 registration fee.
- Companion component allows consumers to search database and validate if a contractor is registered.
- Consumers can also access information about lawsuits, judgments, prior businesses, etc.
- Incorporates geospatial coding of data to facilitate location-based searches and mapping of registered contractors.
- Data is presented in a dashboard.
- Effort:
 - 2 full-time resources
 - 6 months (*Note: Delivered 2 months ahead of schedule*)

Home Imp. Contractor Reg.

Web-Based Registration Application

The screenshot shows the top section of a web application. At the top left, there is a graphic with a hammer and saw blade next to the text "HOME IMPROVEMENT CONTRACTOR REGISTRATION APPLICATION". To the right of this is the name "TOM CORBETT" and the title "ATTORNEY GENERAL". Below this is a navigation menu with links: Home, Complaints, Consumers, Crime, Drugs, Kids, Parents & Schools, Press, Seniors, The Office, Search, and Contact Us. The main content area is divided into two columns. The left column has two sections: "Applicant Type Information" and "State Options", both with "[Help]" links. Under "Applicant Type Information" are radio buttons for Individual, General Partnership, Joint Venture, Corporation, Limited Liability Company, and Limited Partnership. Under "State Options" are radio buttons for In-State and Out-Of-State. A "Next" button is centered below these sections. The right column is titled "APPLICATION PROGRESS" and contains the text "Applicant Type". At the bottom left of the page is an "SSL Secured Site" icon with the text "click to verify". At the bottom center is the "PCI Security Standards Council" logo. The footer contains a list of links: Complaints, Press Releases, Site Map, Subscriptions, Contact Us, Internet Policies, and Spanish Disclaimer. Below the links is a copyright notice: "The content of this site is the property of the Pennsylvania Office of Attorney General. Reuse of this content requires permission of the Press Office." At the very bottom, the address "Pennsylvania Office of Attorney General, Strawberry Square, Harrisburg, PA 17120" and phone number "717-787-3391" are listed, along with "Copyright © 2005-2009, All rights reserved."

HOME IMPROVEMENT CONTRACTOR REGISTRATION APPLICATION

TOM CORBETT • ATTORNEY GENERAL

[Home](#) | [Complaints](#) | [Consumers](#) | [Crime](#) | [Drugs](#) | [Kids, Parents & Schools](#) | [Press](#) | [Seniors](#) | [The Office](#) | [Search](#) | [Contact Us](#)

Applicant Type Information [Help] **State Options** [Help]

Individual In-State

General Partnership Out-Of-State

Joint Venture

Corporation

Limited Liability Company

Limited Partnership

Next

APPLICATION PROGRESS

Applicant Type

SSL Secured Site
click to verify

PCI Security Standards Council

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Home Imp. Contractor Reg.

Contractor Data Maintained in HIC System

http://crm.ag.gov/ - Microsoft Dynamics CRM - Windows Internet Explorer

OAG 311 System Himes, Derek
OAG 311 System

New Activity | New Record | Go To | Tools | Advanced Find Help

Home Improvement

Businesses

Search for records View: Approved Businesses

New | More Actions

Name	Primary Contact	Business Phone	Registration Number	Expiration Date	Applicant Type
stanley Seese & Son Masonry	Stanley M Seese	570-595-2678	PA030112	7/1/2011	Individual
marchant Heating & Cooling Systems	Daniel J Marchant	814-825-9559	PA019862	7/1/2011	Individual
mc ginley holdings llc t/a pro power ...	mark s mcginley	610-399-5353	PA046739	7/27/2011	Limited Liability Company
w. J. Scott, LLC.	Wilma J Scott	412-849-0780	PA053686	9/14/2011	Limited Liability Company
Adrian DeAngelo Custom Painting	John A DeAngelo	610-351-1175	PA048087	8/2/2011	Individual
ALPHA ELECTRIC LLC	PERRY G PULLITANO	570-643-4098	PA032524	7/1/2011	Limited Liability Company
AMAROSA GENERAL CARPENTRY	STEPHEN M AMAROSA	570-439-3008	PA018282	7/1/2011	Individual
Basement Painting (Troll Basement P...	Andrew M Bencsics	412-999-6910	PA054471	9/22/2011	Individual
BEACH CARPENTRY	GOVERNER BEACH	570-618-0356	PA041553	7/10/2011	Individual
Bob Maranche	Robert J Maranche	724-865-9852	PA004057	7/1/2011	Individual
Burns Drilling & Excavating Co.	BeLinda F Burns	724-428-4361	PA021100	7/1/2011	Corporation
C & A Property Services Corp.	Kenneth J Reed	610-292-8860	PA033164	7/1/2011	Corporation
Central Penn Fence Company	Christian P Bashore	717-541-0720	PA054829	9/25/2011	Individual
Craig Renninger Construction	Craig A Renninger	610-367-9434	PA028201	7/1/2011	Individual
Craig Sweitzer Construction	Craig A Sweitzer	412-527-9139	PA021807	7/1/2011	Individual
Custom Roofing	Stephen Carpenter	724-775-1907	PA046075	7/24/2011	Individual
Daniel Steele Sr. and Jerod Dosch	Daniel Steele Sr.	724-840-4065	PA027788	7/1/2011	General Partnership
Dave Harper Construction	david s harper	724-322-2935	PA043845	7/16/2011	Individual
Double "E" Construction	David S Eister	570-527-7912	PA018866	7/1/2011	Individual
E. L. Wright Construction Service LTD.	Ernest L Wright	267-246-1935	PA045219	7/21/2011	Corporation
Erway Drapery Design	Frederick I Erway	717-938-5930	PA040170	7/7/2011	General Partnership
Gene the painter	Eugene D Gregorio	570-885-2018	PA047112	7/29/2011	Individual
Heidler Security Service	Terry Heidler	717-428-1737	PA009841	7/1/2011	Individual
Hock's Painting	John L Hock	570-586-2253	PA052577	9/2/2011	Individual
In- Specs Construction Services dba ...	voera s bahl	814-964-0452	PA049023	8/6/2011	Individual
J & T General Contracting Services	Anthony Delconte	570-407-1274	PA014465	7/1/2011	General Partnership
J W Mumper Construction Inc	James W Mumper Jr	717-691-6919	PA006651	7/1/2011	Corporation
JAMES MICKLEY	JAMES E MICKLEY	717-476-0125	PA035209	7/1/2011	Individual
JANIS FAMILY PARTNERSHIP	ISRAEL LOPEZ	717-926-6284	PA031980	7/1/2011	General Partnership

1 of 250 selected.

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Trusted sites | Protected Mode: Off | 100%

Home Imp. Contractor Reg.

Maintaining Detailed Information About Contractors

Background: Information - Windows Internet Explorer

Save and Close | Reports | Actions | Help

Background: Information
Information

Details:
Information
Workflows

General | Notes

Background Information

Action *

Date of Action *

Action Taken *

Court Information

Court Name Caption

Docket Number

Agency Information

Agency

Address 1 City

Address 2 State

Address 3 Zip

Record Audit Information

Created By Created On

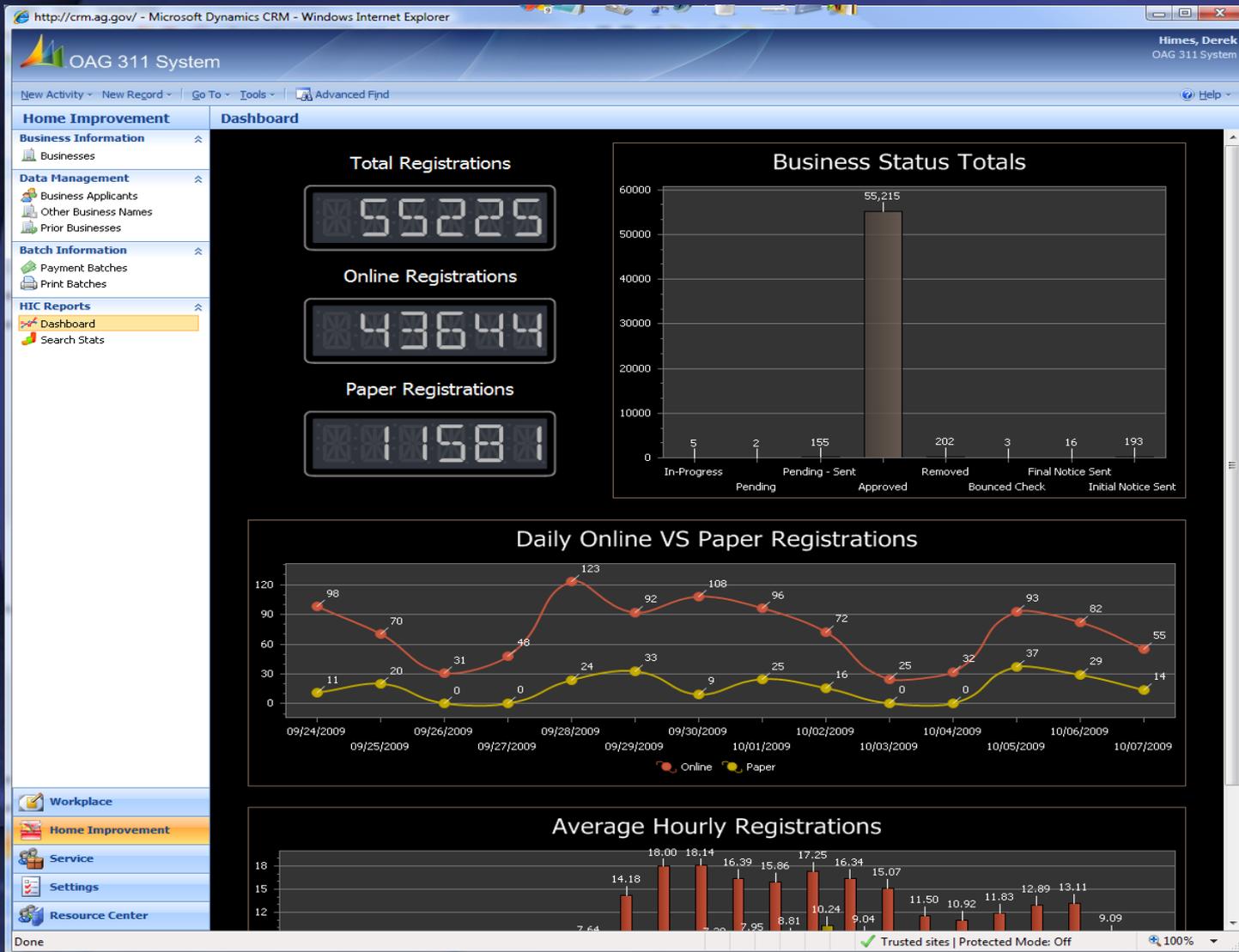
Modified By Modified On

Status: Active

Local intranet | Protected Mode: Off | 100%

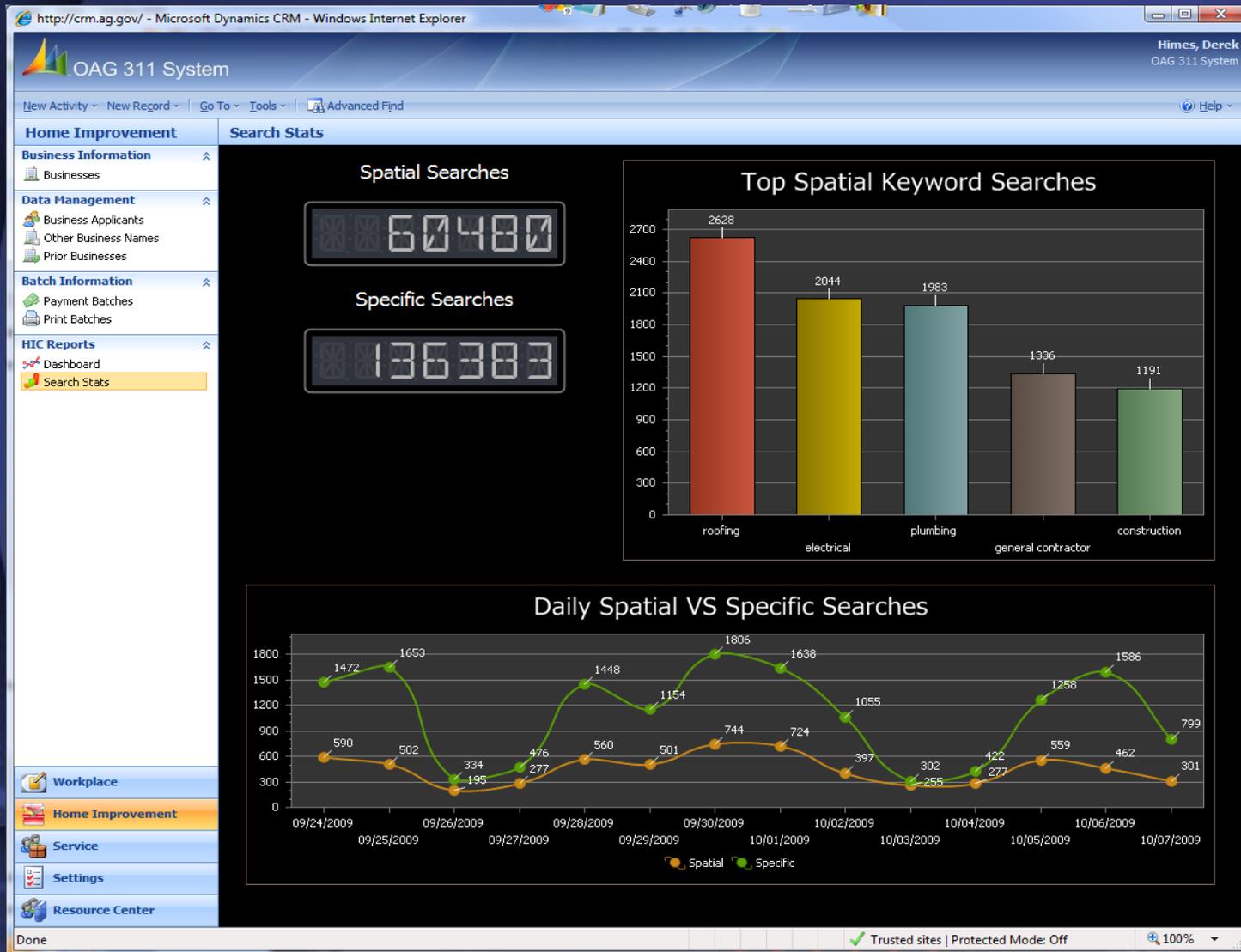
Home Imp. Contractor Reg.

Registration Dashboard



Home Imp. Contractor Reg.

Search Statistics Dashboard



HR Applicant System

- First phase of a project to implement an HR system that automates the entire employee lifecycle from application through hiring, provisioning, management and de-provisioning.
- Applicant System provides interested candidates the ability to complete and submit an electronic employment application via web-based form, including the submission of attachments.
- Once the electronic application is received, all following steps in the initial assessment of candidates are automated.
- System includes integration with Outlook and Office.
- Effort:
 - 2 full-time resources
 - 2 months (*Note: Delivered system on time.*)

HR Applicant System

On-Line Application



[Home](#) | [Complaints](#) | [Consumers](#) | [Crime](#) | [Drugs](#) | [Kids, Parents & Schools](#) | [Press](#) | [Seniors](#) | [The Office](#) | [Search](#) | [Contact Us](#)

Create an account

* Indicates required field

* Email Address:

* Password:

* Confirm Password:

* Security Question:

* Security Answer:

Create User

Already have an account?

Email Address:

Password:

Remember Me Next Time

Login

[Forget Password?](#)

[Complaints](#) | [Press Releases](#) | [Site Map](#) | [Subscriptions](#) | [Contact Us](#) | [Internet Policies](#) |  [Spanish Disclaimer](#)

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HR Applicant System

View of Applicants with On-Line Accounts

Microsoft Dynamics CRM - Windows Internet Explorer
http://crm.ag.gov/Personnel/loader.aspx

OAG Personnel System
Derek Himes
OAG Personnel

New Activity | New Record | Go To | Tools | Advanced Find | Help

Settings

- Administration
- Business Management
- Customization
- Templates
- Product Catalog
- Workflows
- Data Management
- System Jobs

Configurations

- Employment Preferences
- Mail-Merge Templates
- States
- Online Accounts**
- OAG Offices
- Counters

Online Accounts

Search for records | View: Active Online Accounts

User Name	Failed Password Attempt C...	IsLockedOut	Last Activity Date	Last Login Date	Created On
1211js@gmail.com	0	No	10/4/2009 9:41 PM	8/19/2009 9:55 AM	
1law@berkeley.edu	0	No	10/1/2009 4:16 AM	9/30/2009 5:43 PM	
aamirqureshi@yahoo.com	0	No	9/27/2009 8:39 PM	9/16/2009 10:26 AM	
acckris@hotmail.com	0	No	9/6/2009 2:12 AM	8/21/2009 12:36 PM	
acr1brad@epix.net	0	No	9/10/2009 9:05 PM	9/10/2009 7:46 PM	
acritter@hotmail.com	0	No	9/29/2009 11:03 AM	9/29/2009 11:03 AM	
adamgreiss@gmail.com	0	No	9/28/2009 4:11 PM	9/28/2009 4:11 PM	
adamlawyer1@gmail.com	0	No	9/11/2009 1:38 PM	9/11/2009 1:38 PM	
adegori@onu.edu	0	No	8/30/2009 6:31 PM	8/30/2009 6:31 PM	
aep59@cornell.edu	0	No	9/29/2009 7:26 PM	9/20/2009 7:08 PM	
aharriso@temple.edu	0	No	8/31/2009 11:29 AM	8/31/2009 11:29 AM	
aharriso@temple.edu	0	No		8/31/2009 11:29 AM	
ahmyers@emory.edu	0	No	8/21/2009 11:20 AM	8/21/2009 10:46 AM	
ahughes07@yahoo.com	0	No	9/8/2009 4:17 PM	9/8/2009 4:17 PM	
ahughes07@yahoo.com	0	No		9/8/2009 4:17 PM	
ahughes07@yahoo.com	0	No		9/8/2009 4:17 PM	
ajb448@psu.edu	0	No	9/21/2009 3:14 PM	9/19/2009 7:12 PM	
ajg27@pitt.edu	0	No	9/21/2009 7:21 PM	9/21/2009 7:21 PM	
ak595@drexel.edu	0	No	9/1/2009 9:09 AM	9/1/2009 9:09 AM	
alexbrandler@gmail.com	0	No	9/29/2009 5:03 PM	9/29/2009 5:03 PM	
alisondeghorn@hotmail.com	0	No	9/2/2009 10:40 PM	9/2/2009 10:40 PM	
allemarie@gmail.com	0	No	9/11/2009 12:30 PM	9/10/2009 11:48 AM	
allenm@dickinson.edu	0	No	9/15/2009 11:17 PM	9/15/2009 11:16 PM	

1 of 250 selected. | Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Trusted sites | Protected Mode: Off | 100%

HR Applicant System

Individual Applicant Information

http://crm.ag.gov/?id={0172FFFB-D695-DE11-9C66-0050569F5001}&etc=10002 - Applicant: UNKNOWN UNK - Windows Internet Explorer

Save and Close | Send E-mail | Follow Up | Actions | Help

Applicant: UNKNOWN UNKNOWN
Information

Details:

- Information
- Activities
- History
- Workflows
- Applicant Job History
- Applicant References
- Applicant Education
- Applicant Addresses
- Applicant Referrals
- Applicant Relatives
- Mail Merges
- Employment Preferen...
- HR Employment Pref...
- Audit

Applicant Info | Contact Info | High School | Competencies/Licenses | Background | Official Use | Audit Info | Notes

Applicant Information

Full Name: UNKNOWN UNKNOWN

Last Name*: UNKNOWN Prefix:

First Name*: UNKNOWN Suffix:

Middle Name: Valid ID: No Yes

SSN*: Valid ID Number:

Valid ID State:

Employment Preferences

Employment County: Statewide Allegheny Bucks Butler

Work Schedule: Permanent Temporary Summer

Minimum Pay: \$ 0.00 Other Employment Preference:

Status: Active

Done Trusted sites | Protected Mode: Off 100%

HR Applicant System

Summary View of Applicant Listing (On-Line and Manual)

Microsoft Dynamics CRM - Windows Internet Explorer
http://crm.ag.gov/Personnel/loader.aspx

OAG Personnel System
Derek Himes
OAG Personnel

Workplace
My Work
Personnel
Applicants
Custom Reports

Applicants

Last Name	First Name	Middle Name	Applicant Status	Application Status	Applicant Status Date	Modified On
UNKNOWN	UNKNOWN		Active			9/30/2009
O'Keefe	Joseph	F.	Pending		8/25/2009	9/15/2009
Manbeck	Jared	P.	Active		9/22/2009	9/22/2009
Zaver	Neelam	N.	Pending		8/25/2009	9/25/2009
Guzan	Emily	F.	Deferred to Certain D...		3/1/2010	10/5/2009
Cecchetti	Brad	P.	Active		9/22/2009	10/5/2009
Caggiano	Jessica	C.	Deferred to Certain D...		3/1/2010	10/5/2009
Magee	Gabriel	C.	On Hold		8/24/2009	10/5/2009
Magee	Gabriel	C.	Hired Non-Paid		8/24/2009	10/5/2009
Garland	Scott	L.	Active		9/22/2009	10/5/2009
Zimmerman	Tara	E.	Pending		8/19/2009	10/5/2009
Absey	Richard	E.	Active		9/22/2009	10/5/2009
Troisi	Paul	F.	Deferred to Certain D...		3/1/2010	10/5/2009
Gerlach	Lauren	J.	Active		9/22/2009	10/5/2009
Markun	Michael	J.	Active		9/22/2009	10/5/2009
Akrami	Marian		Deferred to Certain D...		3/1/2010	10/5/2009
Jones	Jennifer	M.	Active		9/22/2009	10/5/2009
Huemrich	Matthew	J.	Active		9/22/2009	10/5/2009
Migliori	Mario	J.	Pending		8/21/2009	10/5/2009
Fisher	John	H.	Active		8/20/2009	10/5/2009
Scherer	Gary	M.	Active		8/20/2009	10/5/2009
O'Conner	Brett	A.	Active		8/20/2009	10/5/2009

1 of 250 selected.

Trusted sites | Protected Mode: Off | 100%

Pre-built reports to meet recurring requests from management.

Applicant status is linked to different workflow processes.

ITS Management System

- System developed to manage and support the IT infrastructure and applications.
 - Hardware
 - Software
 - Applications
 - Change Management
 - Key Contacts (Vendors, Service/Maintenance Information)
- Also provides the information to be included in the OAG – IT Disaster Recovery Plan.
- Notifications to management and affected staff when changes are made.
- Effort:
 - 1 full-time resource
 - 2 weeks

ITS Management System

Hardware

Microsoft Dynamics CRM - Windows Internet Explorer
http://crm.ag.gov/ITS/loader.aspx

ITS Management
Tron Keeper
Information Technology Section

Workplace
My Work
Servers
Server Uses
DNS Entries
Applications
Databases
Applications
Service Accounts
Service Account Uses
Contacts
Vendors
Contacts
Change Management
Changes
Reports
Servers
Applications
Changes
Vendors

Servers
Search for records
View: Active Servers

Name	Category	Server Type	IP Address 1	IP Address 2	Reboot	Service Tag
2K8_32X	Other	Dev	10.180.3.111		Yes	
2k8_32x_wIIS_30g	Other				No	
ACCESS GATEWAY C...	Other		10.180.3.150		No	
Codian (Tandberg)	Other	Prod	10.180.3.241		Yes	
http://www.ag.gov/	Other		10.180.0.76		No	
NETAPPHDQ01	Other		10.180.0.220		No	
NETAPPHDQ02	Other		10.180.0.223		No	
NETAPPSU01	Other		10.180.80.105		No	
NetScaler ag.gov	Other		10.180.3.218		No	
SAECMM100301	Server		10.180.0.153		No	
SAPPS100301	Server	Prod	10.180.3.128		No	
SAPPS200301	Server	Prod	10.180.3.129		No	
SAPPS300301	Server	Prod	10.180.3.130		No	
SAPPS400301	Server	Test	10.180.3.131		Yes	
SAPPS500301	Server	Dev	10.180.3.163		No	
SAPPS600301	Server	Dev	10.180.3.164		No	
SAPPS700301	Server	Prod	10.180.3.165		No	

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All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Workplace is organized into logical categories

ITS Management System

Applications

The screenshot shows the Microsoft Dynamics CRM interface for managing applications. The left-hand navigation pane (Workplace) includes sections for Servers, Applications, Contacts, Change Management, and Reports. The 'Applications' section is highlighted with a red box. The main area displays a table of active applications with the following columns: Name, Application Type, Version, Platform, and Priority. The 'Priority' column is highlighted with a red box. The table lists 35 applications, with the following data visible:

Name	Application Type	Version	Platform	Priority
Agile Fleet	Prod	4.6	Server	Medium
APS Dashboard	Prod		Server	Low
Asset Forfeiture	Prod	1	Server	Medium
AttorneyGeneral.GOV	Prod	6	Server	High
Case Expense Tracking	Prod	1	Server	Medium
Coroner Management	Prod	1	Server	Low
CRM Mobile Express	Prod	1	Server	Low
DA Expense Tracking	Dev	1	Server	Medium
Do Not Call	Prod	1	Server	High
Federal Asset Management	Dev	1	Server	Medium
Home Improvement Contractor	Prod	1	Server	High
HR Applicant Portal	Prod	1	Server	High
HR System	Prod	1	Server	Medium
ICMS	Prod			
Imanami Webdir	Prod	4.0	Server	Low
Information Technology Section	Prod	1	Server	Medium
Intel Audits	Prod	1	Server	Medium
Key Inventory	Prod	1	Server	Low

The workplace provides quick links to different aspects of applications.

Application categories establish restoration priorities in the event of a disaster.

ITS Management System

Changes

Microsoft Dynamics CRM - Windows Internet Explorer
http://crm.ag.gov/ITS/loader.aspx
Microsoft Dynamics CRM
ITS Management
Tron Keefer
Information Technology Section
New Activity - New Record - Go To - Tools - Advanced Find
Help

Workplace
My Work
Servers
Servers
Server Uses
DNS Entries
Applications
Databases
Applications
Service Accounts
Service Account Uses
Contacts
Vendors
Contacts
Change Management
Changes
Reports
Servers
Applications
Changes
Vendors
Personalize Workplace ...
Workplace
Settings

Search for records
View: Active Changes

Name	Time of Change	Created On	Created By
Ektron accounts removed	9/30/2009 12:00 PM	9/30/2009	Michael Dunmire
Added cname alias cxiis to sapps100301	9/28/2009 9:00 AM	9/28/2009	Tron Keefer
Installed caselogistix dashboard on sapps100301	9/28/2009 9:00 AM	9/28/2009	Tron Keefer
Added DNS entry for dashboards.ag.gov	9/25/2009 1:00 PM	9/28/2009	Derek Himes
Imported new entities, registered plugins, deployed new ...	9/25/2009 10:00 AM	9/28/2009	Derek Himes
Deployed new Public Outreach Registration form.	9/25/2009 9:00 AM	9/28/2009	Derek Himes
Upgraded AgileFleet to v4.6	9/24/2009 9:00 AM	9/24/2009	Tron Keefer
Upgraded Sharepoint to SP2	9/21/2009 8:00 PM	9/21/2009	Tron Keefer
Added DNS entry for search.attorneygeneral.gov	9/21/2009 8:30 AM	9/21/2009	Tron Keefer
Created sharepoint app for search.attorneygeneral.gov	9/21/2009 8:30 AM	9/21/2009	Tron Keefer
SharePoint-Forms&Docs-Purchasing Doclib	8/27/2009 2:12 PM	8/27/2009	Michael Dunmire
Added internal DNS for employment.attorneygeneral.gov	8/17/2009 12:00 PM	8/17/2009	Tron Keefer
Disabled Valor AppEvent Tracing	8/10/2009 4:00 PM	8/13/2009	Tron Keefer
Valor Workflow report fix	7/23/2009 9:30 AM	7/23/2009	Tron Keefer
SAS Upgrade - General Invoice Calc Error	7/17/2009 9:00 AM	7/20/2009	Tron Keefer
Rollups 4&5 applied on CRM	7/16/2009 1:00 PM	7/20/2009	Tron Keefer
.GOV ShareThis feature	7/14/2009 9:30 AM	7/20/2009	Tron Keefer
Valor Evidence upgrade	7/9/2009 6:00 PM	7/20/2009	Tron Keefer

1 of 75 selected.
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All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Who made the change, to what application or hardware component, nature of change and when the change was made.

ITS Management System

Pre-Built Reports

Microsoft Dynamics CRM - Windows Internet Explorer

http://crm.ag.gov/ITS/loader.aspx

Tron Keefer
Information Technology Section

ITS Management

New Activity ▾ New Record ▾ Go To ▾ Tools ▾ Advanced Find

Workplace

My Work

Servers

- Servers
- Server Uses
- DNS Entries

Applications

- Databases
- Applications
- Service Accounts
- Service Account Uses

Contacts

- Vendors
- Contacts

Change Management

- Changes

Reports

- Servers
- Applications
- Changes
- Vendors

Personalize Workplace ...

Workplace

Settings

Applications

Page 1 of 6 Pdf

Application	Type	Version	Platform	Priority	No. Users
Agile Fleet	Prod	4.6	Server	Medium	1000
DNS Entries					
cars.ag.gov		Internal			
Databases					
FleetCommander			SSQLR400301		
Vendors					
Agile					
Vendor Contacts					
Application	Type	Version	Platform	Priority	No. Users
APS Dashboard	Prod		Server	Low	50
DNS Entries					
clxiis		Internal			
Service Accounts					
Caselogistix			cbxuser		
Vendors					
Caselogistix					
Vendor Contacts					
Application	Type	Version	Platform	Priority	No. Users
Asset Forfeiture	Prod	1	Server	Medium	67
DNS Entries					
af.attorneygeneral.gov		Internal			
Databases					

Reports have been built in advance for use by ITS and for regular updates to the DR Plan.

Benefits of Building in XRM

- Ability to build complex applications in accelerated timeframes.
- Do not have to build application tiers from scratch.
 - *XRM provides presentation and data layers*
 - *We build the business logic layer to meet our needs.*
 - *Workflow*
 - *Building custom plug ins.*
 - *Employing solutions from ISVs.*
- Allows both senior and junior staff to be productive contributors on projects.
- Build once – use many times.
- Great integration with other business productivity tools (Office, Exchange)
- Robust security.

Benefits of Building in XRM

- Web services.
- Rich reporting capabilities.
- Web-based nature make upgrade deployments easy.
- Easy to expose applications to the web.
- Users become accustomed to a consistent interface.
- High licensing cost, but...
 - *One license can be leveraged for multiple applications.*
- Availability of XRM Accelerators.

Summary

- OAG has made a major commitment with Dynamics XRM.
- “Not just for CRM anymore.”
- Adopted as a development platform for building feature-rich applications in greatly accelerated timeframes.

And as CIO, I can stay away from the alligators...



...and focus on more important matters

Questions



For Additional Information:

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