INFORMATION COMPLIANCE

Agenda

- Intro to AXLR8
  - Company History in Public and NFP Sectors
  - Core expertise
- Request Tracker
  - Workflow
  - Users
  - Public disclosure
  - Reports
  - Admin
- Business Case

Who are we?

- AXLR8 formed 1992 as in house project
- Created success
  - 300 of Times Top 1000 plus banks, PS,
- TechVest venture capital
- 2002
  - Pathfinder Project with WSCC
- 2010
  - Profitable with 450 clients
  - major technology assets
  - Verticals & scalable “productisation” strategy

The business where AXLR8 developed their system grew so fast it needed 7 office moves in 6 years. This was the final one before Hummingbird acquired the company. The directors reinvested the money n developing and marketing AXLR8 systems.

Customer Awards

- Winner: Technology for Marketing 2007
- British Computer Society Awards 2006
- Technology Wales 05 finalist
- DTI awards in 2006.

Community projects

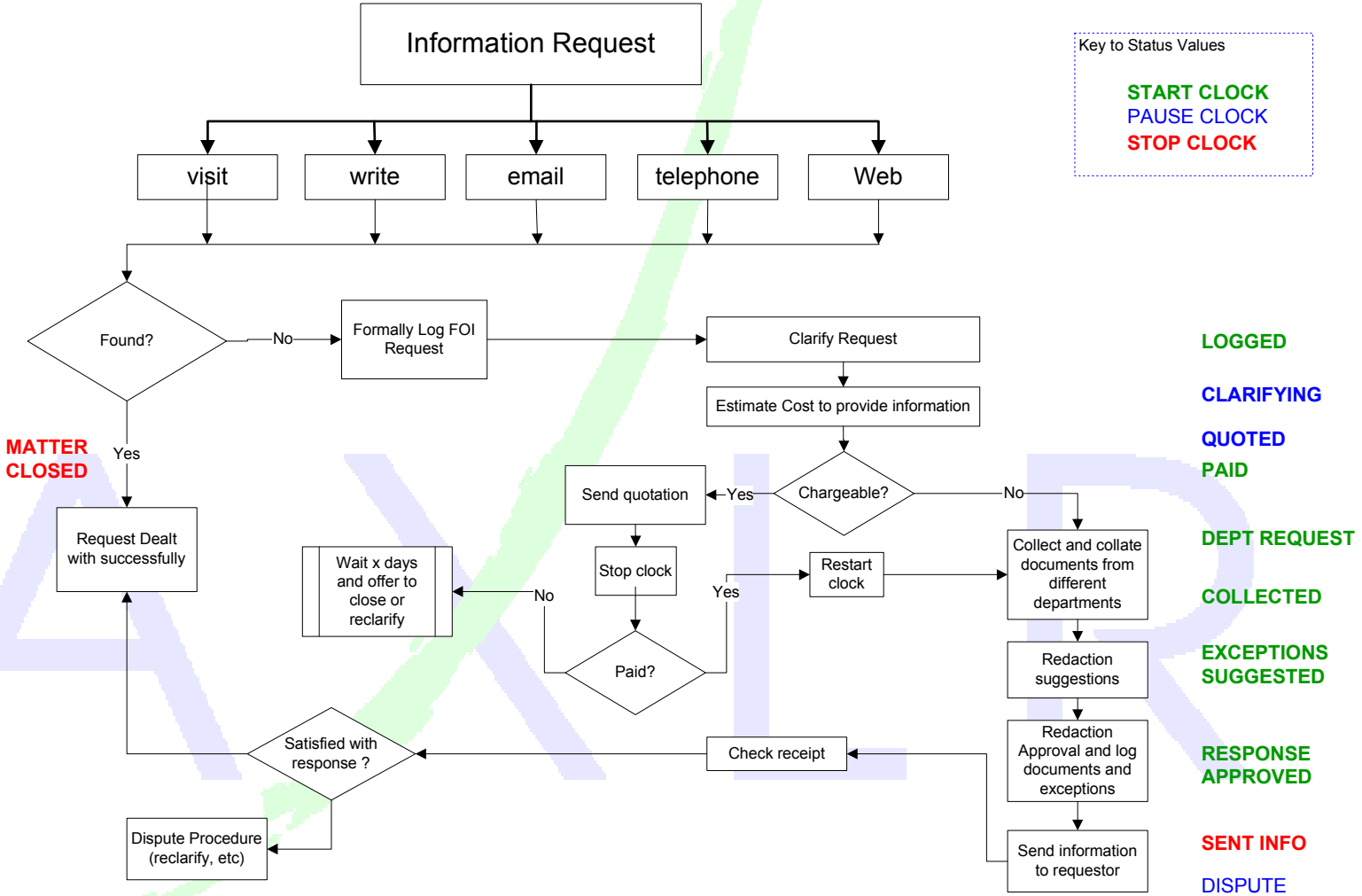
AXLR8 Triathlon

2010 (7th year) 1200 people, 80 volunteer helpers, 30 commercial sponsors…

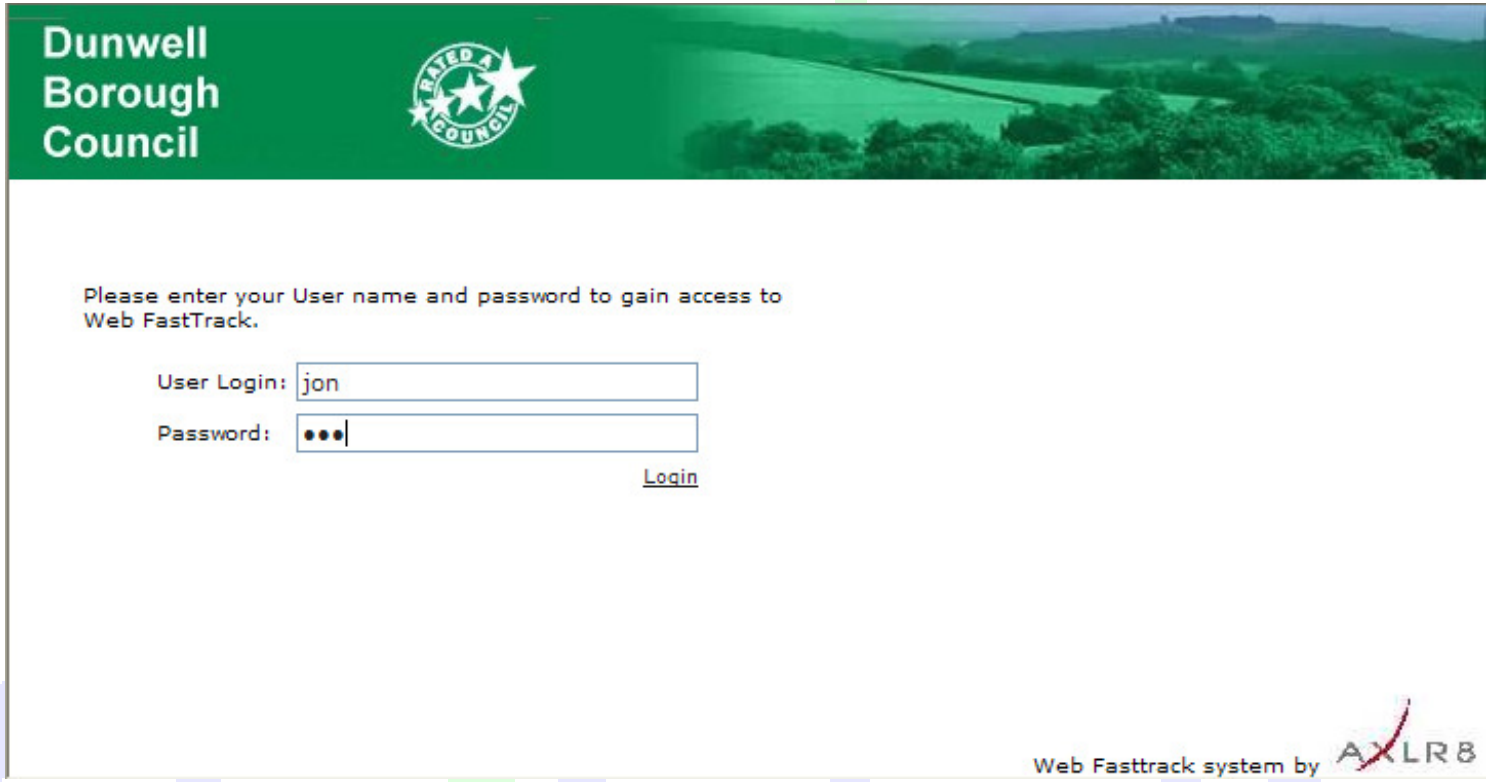
Cumulative £70k+ raised for Cancer Research UK and Naomi House Children's Hospice & Thames Valley and Chiltern Ari Ambulance

AXLR8 Egg Race 2010 *watch this space!*

Workflow Supported

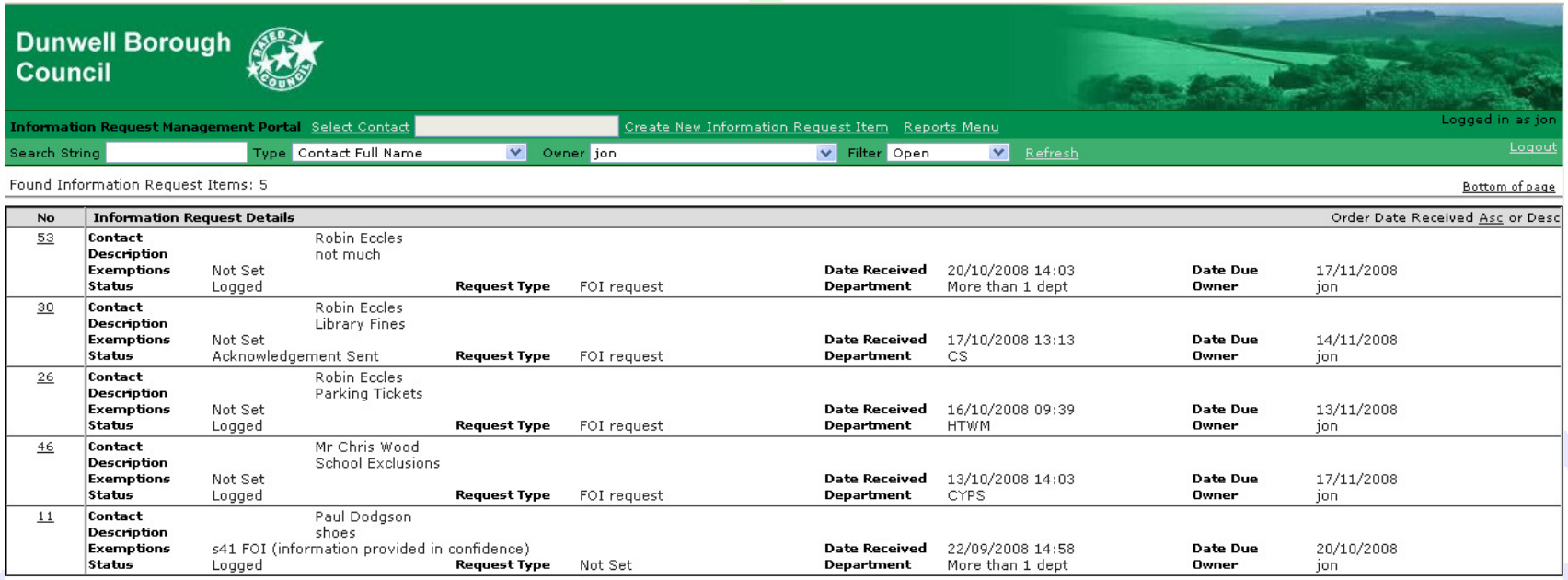


Authorisation



Secure private log in to the system

Information Request Manager



Dunwell Borough Council

Information Request Management Portal | Select Contact | Create New Information Request Item | Reports Menu | Logged in as jon

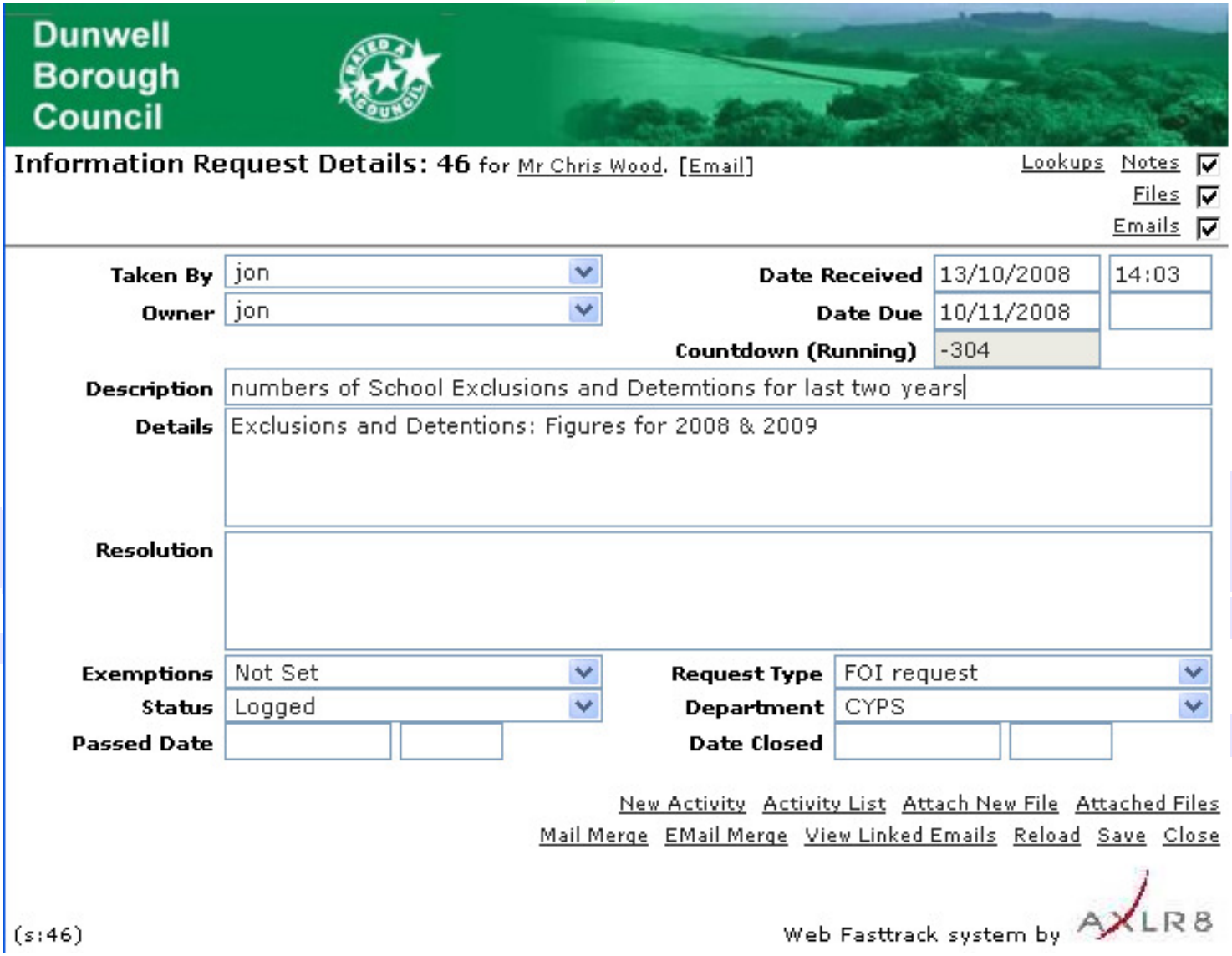
Search String | Type: Contact Full Name | Owner: jon | Filter: Open | Refresh | Logout

Found Information Request Items: 5 — Bottom of page

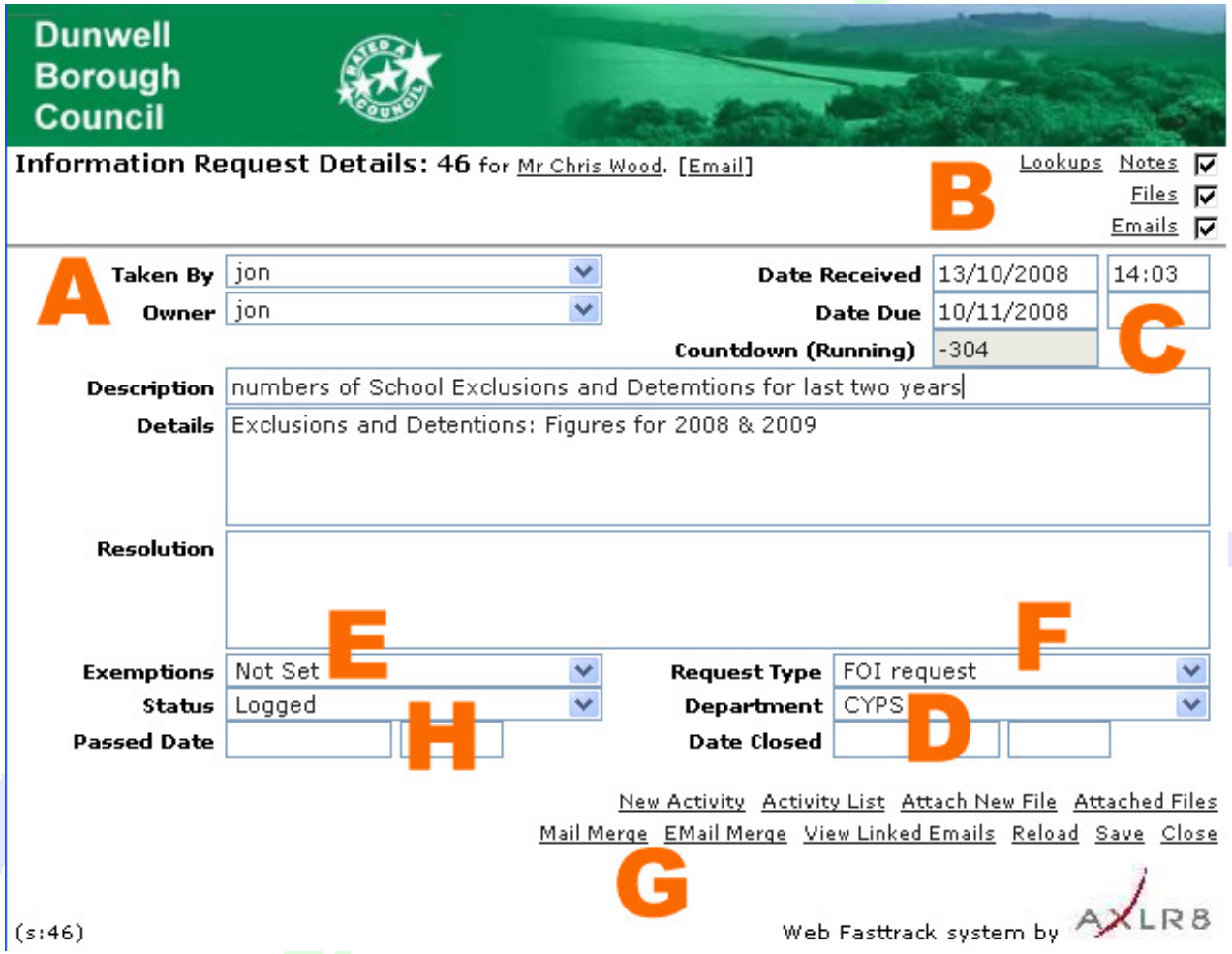
No	Information Request Details								Order Date Received Asc or Desc
53	Contact	Robin Eccles							
	Description	not much							
	Exemptions	Not Set			Date Received	20/10/2008 14:03	Date Due	17/11/2008	
	Status	Logged	Request Type	FOI request	Department	More than 1 dept	Owner	jon	
30	Contact	Robin Eccles							
	Description	Library Fines							
	Exemptions	Not Set			Date Received	17/10/2008 13:13	Date Due	14/11/2008	
	Status	Acknowledgement Sent	Request Type	FOI request	Department	CS	Owner	jon	
26	Contact	Robin Eccles							
	Description	Parking Tickets							
	Exemptions	Not Set			Date Received	16/10/2008 09:39	Date Due	13/11/2008	
	Status	Logged	Request Type	FOI request	Department	HTWM	Owner	jon	
46	Contact	Mr Chris Wood							
	Description	School Exclusions							
	Exemptions	Not Set			Date Received	13/10/2008 14:03	Date Due	17/11/2008	
	Status	Logged	Request Type	FOI request	Department	CYPS	Owner	jon	
11	Contact	Paul Dodgson							
	Description	shoes							
	Exemptions	s41 FOI (information provided in confidence)			Date Received	22/09/2008 14:58	Date Due	20/10/2008	
	Status	Logged	Request Type	Not Set	Department	More than 1 dept	Owner	jon	

- List of information requests for “me” to answer.

IR Details Sheet



IR Details Sheet



A. Responsible officer
B. knowledge records
C. Timer “Clock”
D. Dept (s)
E. Exemptions
F. Request Type
G. Mail merge
H. Status (e.g. logged, closed, etc.)

General details

Responsible officer

selected according to your organisation's criteria and policies

Knowledge & records

various attached files, documents, notes and emails that will help solve similar issues. Some may be selected for public disclosure.

Dept (s) & Exemptions

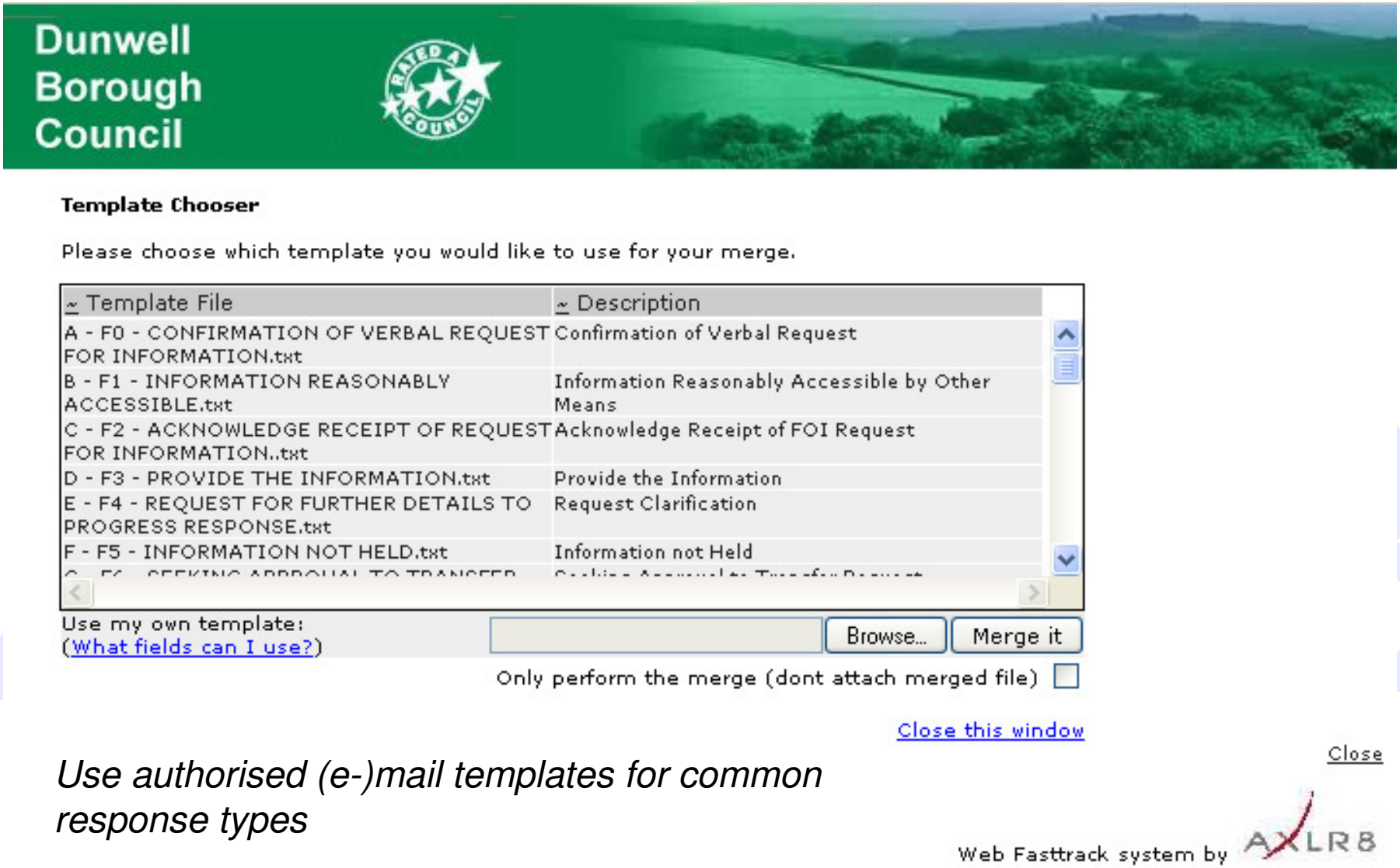
important for reporting

Request Type

defines behaviour of calendar/ clock and visibility

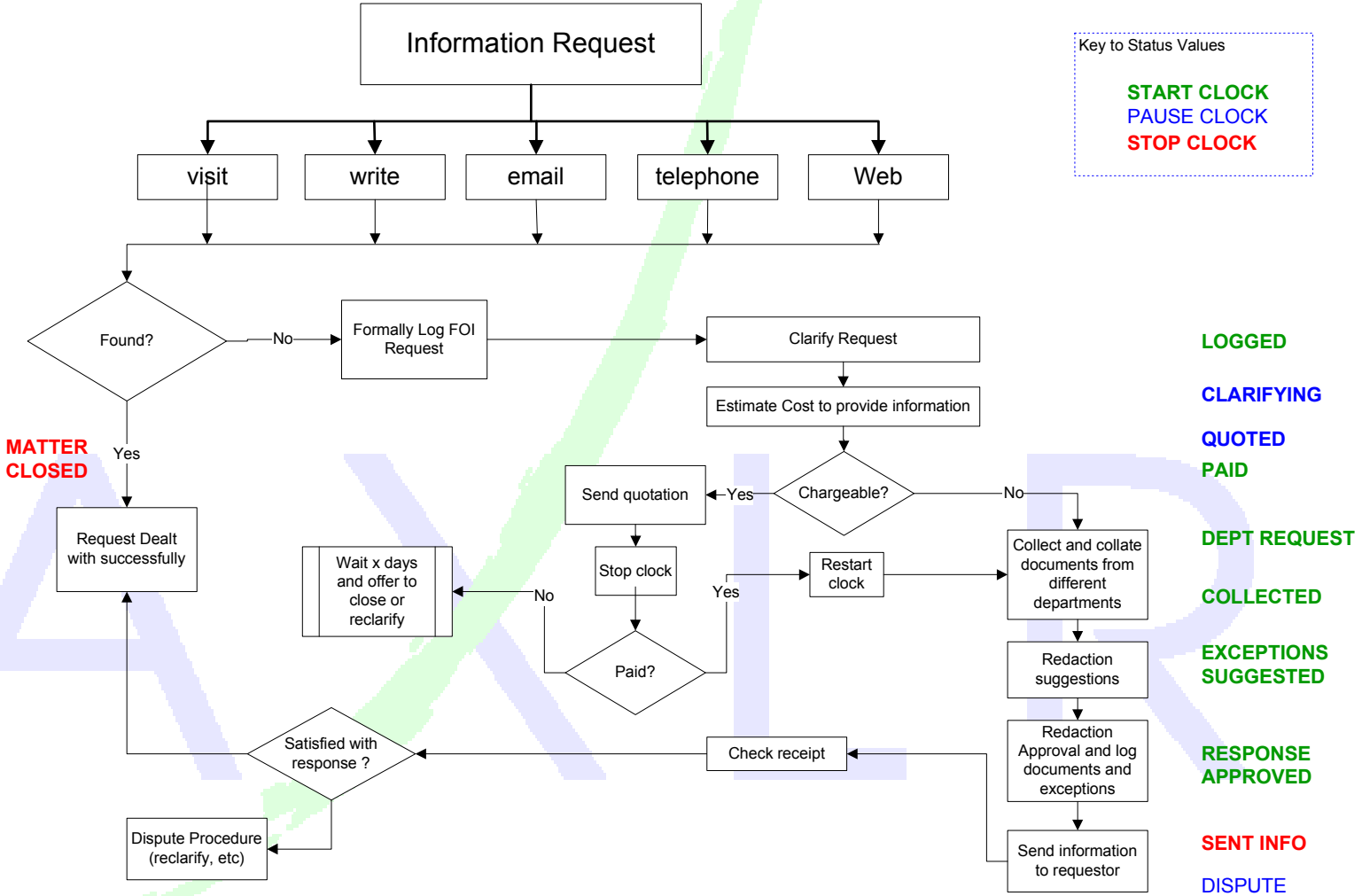
All are defined by someone in your organisation at implementation time and from time to time as required afterwards

Mail merge

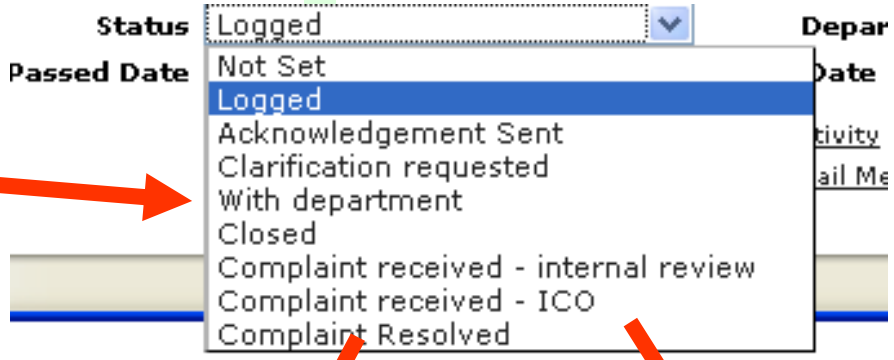


Use authorised (e-)mail templates for common response types

Workflow Supported



Status of the request

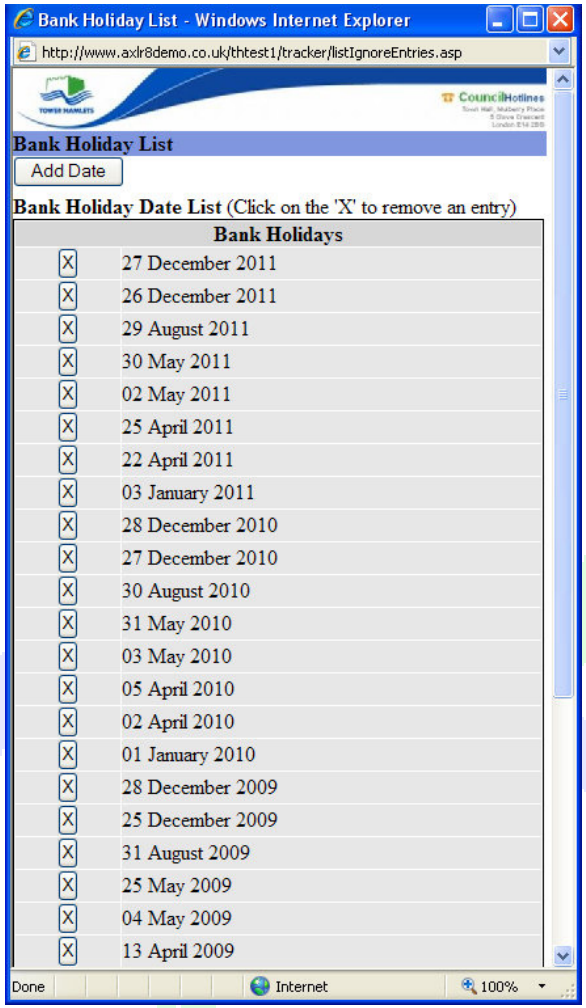


Defined (names, whether the clock stops or pauses, etc.) by management using Admin authority

Start and stop the clock

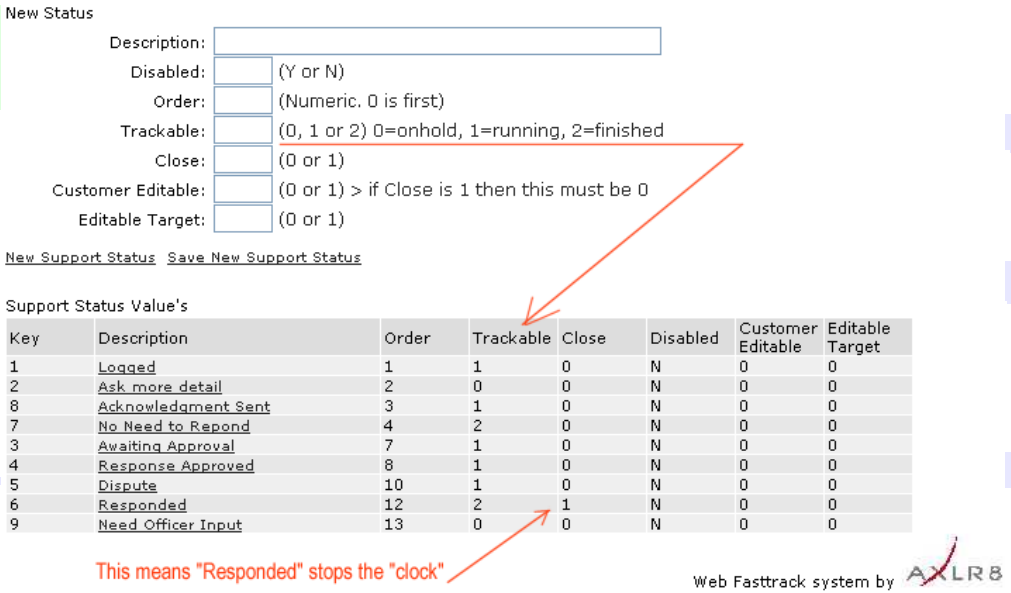
Reports (e.g. by dept, costs, by type, days to close, over due, etc

The “Clock”



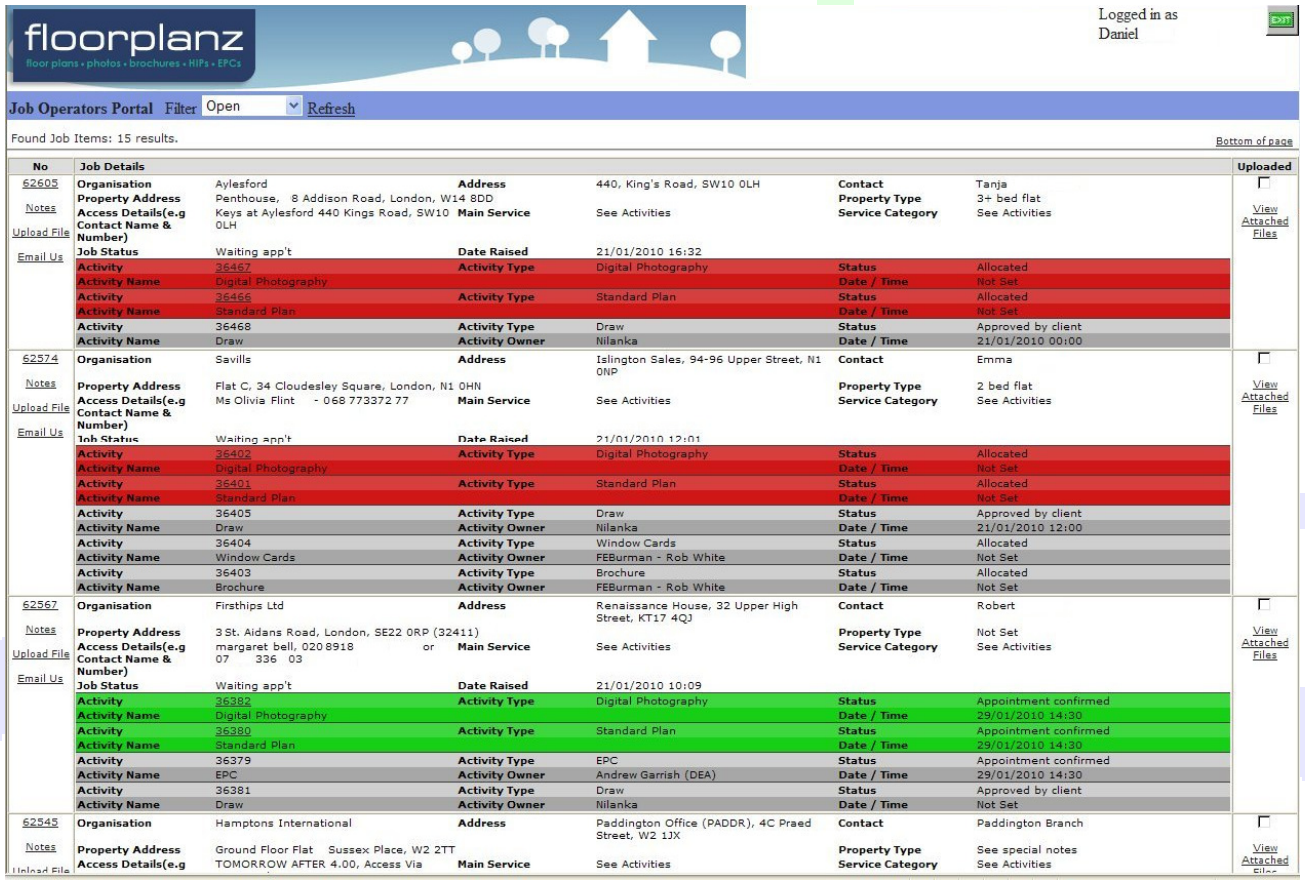
Bank holidays excepted

- FOI and EIR 20 working days
  - bank holidays
  - weekends
- DPA 40 Calendar days
- CAFCAS, RIPA, etc



Clock status behaviour

Many Activities in Request



floorplanz
floor plans • photos • brochures • HIPs • EPCs

Logged in as Daniel

Job Operators Portal Filter Open Refresh

Found Job Items: 15 results. Bottom of page

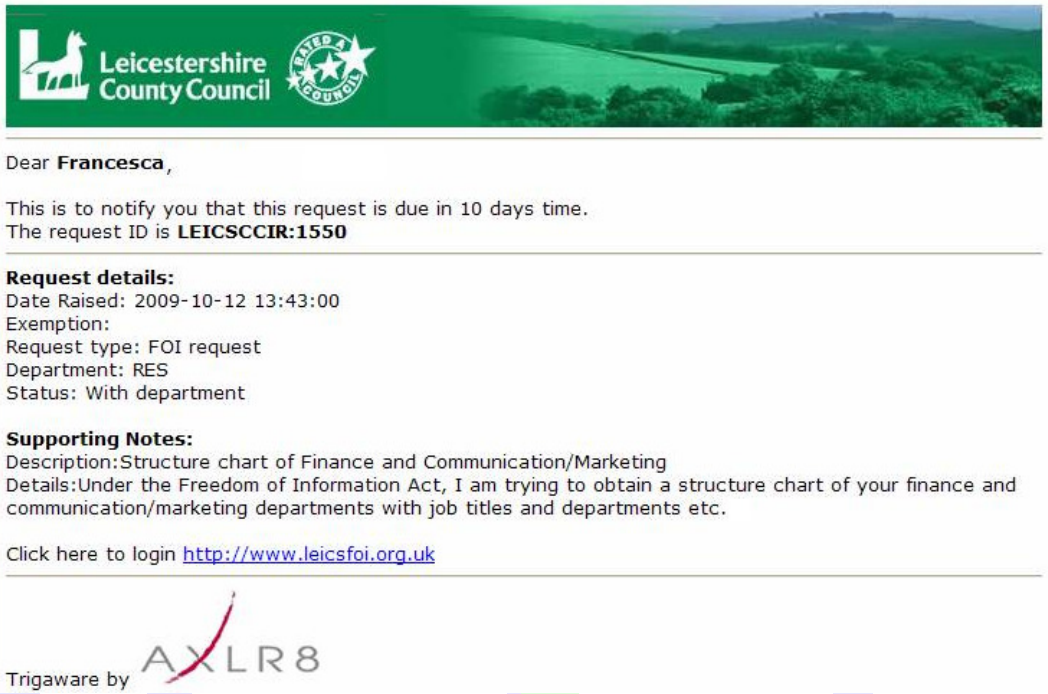
No	Job Details						Uploaded
62605	Organisation	Aylesford	Address	440, King's Road, SW10 0LH	Contact	Tanja	
Notes	Property Address	Penthouse, 8 Addison Road, London, W14 8DD			Property Type	3+ bed flat	View Attached Files
Upload File	Access Details(e.g Contact Name & Number)	Keys at Aylesford 440 Kings Road, SW10 0LH	Main Service	See Activities	Service Category	See Activities	
Email Us	Job Status	Waiting app't	Date Raised	21/01/2010 16:32			
	Activity	36467	Activity Type	Digital Photography	Status	Allocated	
	Activity Name	Digital Photography			Date / Time	Not Set	
	Activity	36466	Activity Type	Standard Plan	Status	Allocated	
	Activity Name	Standard Plan			Date / Time	Not Set	
	Activity	36468	Activity Type	Draw	Status	Approved by client	
	Activity Name	Draw	Activity Owner	Nilanka	Date / Time	21/01/2010 00:00	
62574	Organisation	Savills	Address	Islington Sales, 94-96 Upper Street, N1 0NP	Contact	Emma	
Notes	Property Address	Flat C, 34 Cloudesley Square, London, N1 0HN			Property Type	2 bed flat	View Attached Files
Upload File	Access Details(e.g Contact Name & Number)	Ms Olivia Flint - 068 773372 77	Main Service	See Activities	Service Category	See Activities	
Email Us	Job Status	Waiting app't	Date Raised	21/01/2010 12:01			
	Activity	36402	Activity Type	Digital Photography	Status	Allocated	
	Activity Name	Digital Photography			Date / Time	Not Set	
	Activity	36401	Activity Type	Standard Plan	Status	Allocated	
	Activity Name	Standard Plan			Date / Time	Not Set	
	Activity	36405	Activity Type	Draw	Status	Approved by client	
	Activity Name	Draw	Activity Owner	Nilanka	Date / Time	21/01/2010 12:00	
	Activity	36404	Activity Type	Window Cards	Status	Allocated	
	Activity Name	Window Cards	Activity Owner	FEBurman - Rob White	Date / Time	Not Set	
	Activity	36403	Activity Type	Brochure	Status	Allocated	
	Activity Name	Brochure	Activity Owner	FEBurman - Rob White	Date / Time	Not Set	
62567	Organisation	Firsthips Ltd	Address	Renaissance House, 32 Upper High Street, KT17 4QJ	Contact	Robert	
Notes	Property Address	3 St. Aidans Road, London, SE22 0RP (32411)			Property Type	Not Set	View Attached Files
Upload File	Access Details(e.g Contact Name & Number)	margaret bell, 020 8918 07 336 03 or	Main Service	See Activities	Service Category	See Activities	
Email Us	Job Status	Waiting app't	Date Raised	21/01/2010 10:09			
	Activity	36382	Activity Type	Digital Photography	Status	Appointment confirmed	
	Activity Name	Digital Photography			Date / Time	29/01/2010 14:30	
	Activity	36380	Activity Type	Standard Plan	Status	Appointment confirmed	
	Activity Name	Standard Plan			Date / Time	29/01/2010 14:30	
	Activity	36379	Activity Type	EPC	Status	Appointment confirmed	
	Activity Name	EPC	Activity Owner	Andrew Garrish (DEA)	Date / Time	29/01/2010 14:30	
	Activity	36381	Activity Type	Draw	Status	Approved by client	
	Activity Name	Draw	Activity Owner	Nilanka	Date / Time	Not Set	
62545	Organisation	Hamptons International	Address	Paddington Office (PADDR), 4C Praed Street, W2 1JX	Contact	Paddington Branch	
Notes	Property Address	Ground Floor Flat Sussex Place, W2 2TT			Property Type	See special notes	View Attached Files
Upload File	Access Details(e.g	TOMORROW AFTER 4.00, Access Via	Main Service	See Activities	Service Category	See Activities	

House Sale Example

- HIP
- EPC
- Floor plan
- Pictures
- Brochure
- Window cards,
- Etc.

Many people contribute their skills and knowledge to respond.

Alerts



- Trigaware™ Autoresponders
- Customised for your organisation
- Personalised to the recipient
- Provide details of the specific activity / request

Public Disclosure

TOWER HAMLETS

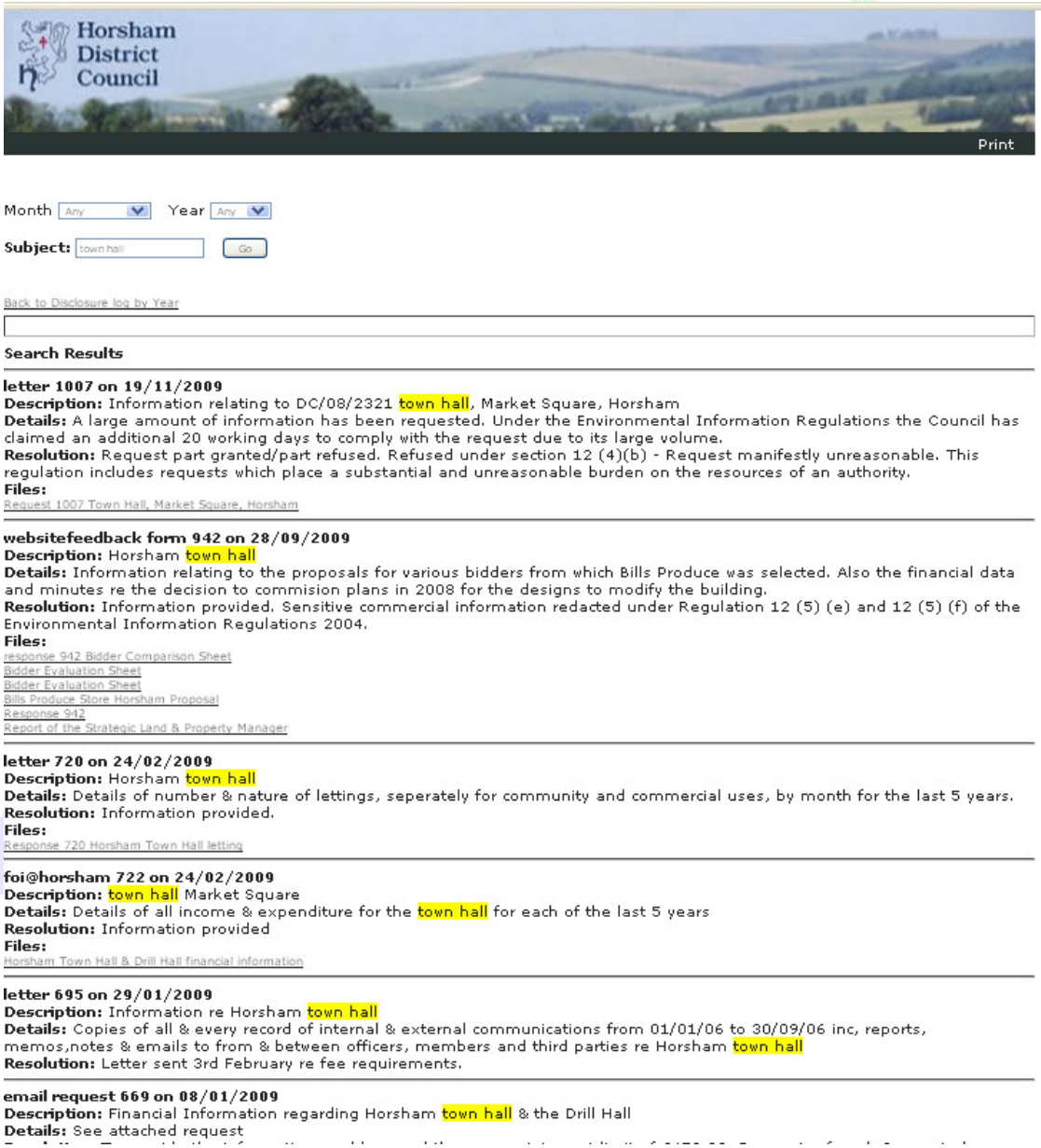
CouncilHotlines
Town Hall, Mulberry Place
5 Clove Crescent
London E14 2BG

FOI requests for 2009 Refresh Key Word Search

Month	No of requests	Ongoing	responded to in under 10 days	responded to in 10 - 20 days	over target
January	8	0	1	7	0
February	1	0	1	0	0
March	5	0	1	4	0
April	0	0	0	0	0
May	0	0	0	0	0
June	1	0	0	1	0
July	11	0	0	11	0
August	1	0	0	1	0
September	37	0	7	30	0
October	62	0	6	56	0
November	51	0	14	37	0
December	43	0	8	35	0
Totals	220	0	38	182	0

Web Fasttrack system by AXLR8

Public Disclosure (Keyword search)

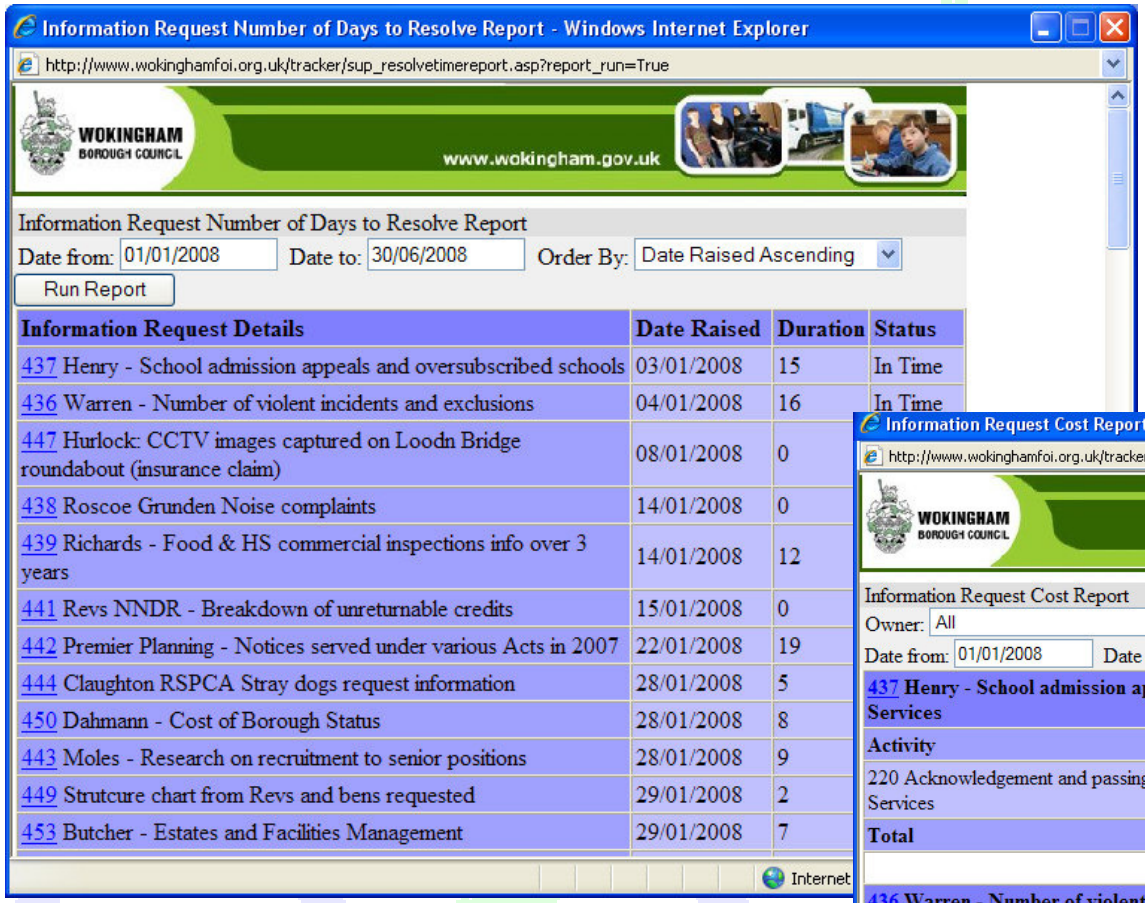


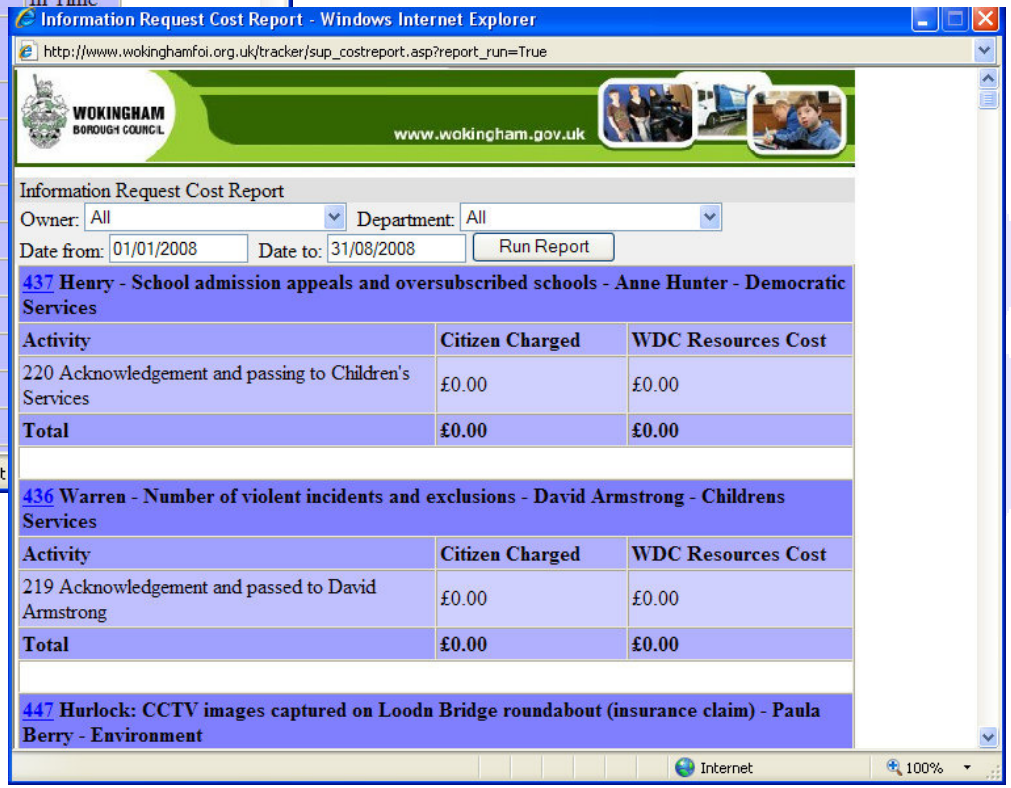
Brings back all responses with the key words in them.

Also shows “public” documents.

Automatically assumes all documents are private unless you publish.

Reports





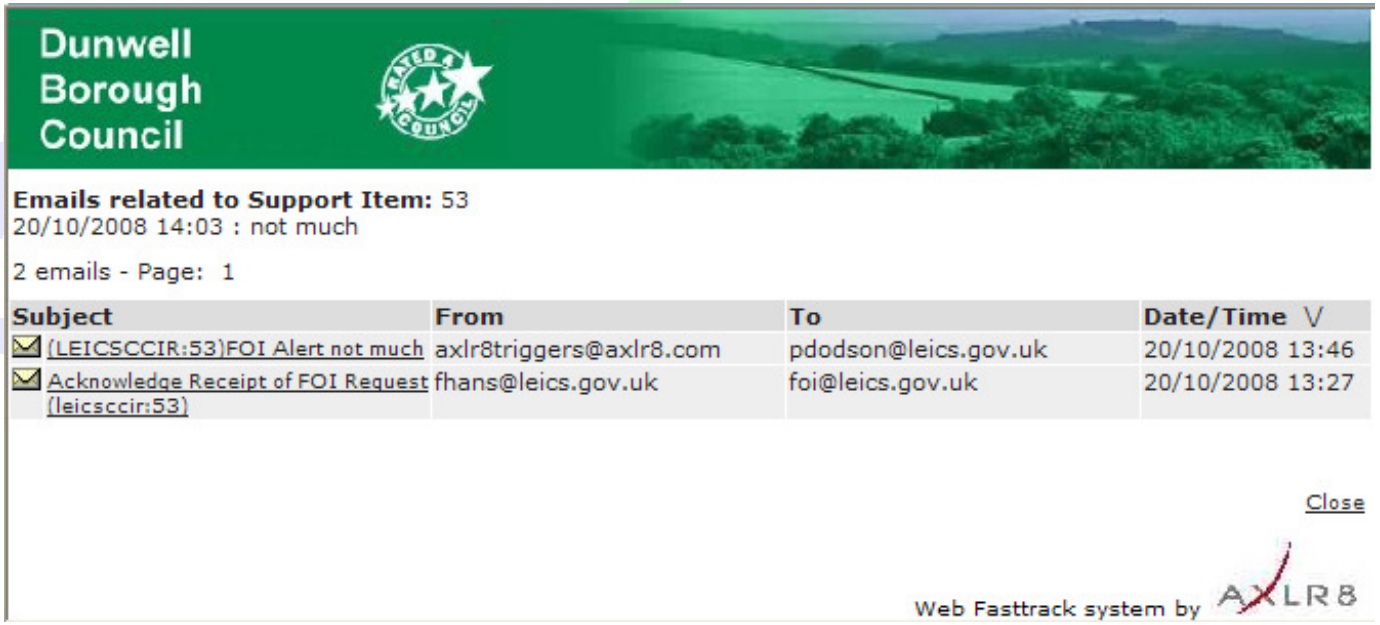
Many reports available including stats, overdue requests, days to respond, costs, etc.

Administration of the system

- Request status and the “Clock”
- Mail Template Admin
- User authority management
- Menu items
- Field Labels
- Profiling
- Login management for portals
- Public and private files
- Other

Email Archiving

- All emails archived saving time attaching manually
- Links through subject line codes



Trigaware™

Trigaware™ looks for problems or just automates tedious correspondence.

Trigaware™ alerts the relevant people:

- Customer/investor/introducer/dealers kept informed of job progress
- Management/Internal quality level warnings
- Saying “Thanks” or “Congratulations”
- Outlying data
- Registering receipt of an order, enquiry, etc.

Trigaware™ takes account of media preferences:

- email most common SMS (text messages) are growing in popularity

Trigaware™ Examples

Customer/investor/introducer/dealer

- *Your job is ready for collection at our ABC depot…*
- *You are booked on the XYZ course at 09:30 on 21st June. Please find attached your joining instructions.*
- *Thank you for your order. Our engineer will ….*
- *Your account is overdue……*
- *You enquired about our training a few days ago and we sent you a CD to illustrate our methods. Did you find it useful?....*
- *We await your electrical report so that we can close our file on this.*
- *You have five more days to respond to this request but it is still at the "collection" status. Please could you let me know if there is a problem.*

Management/Internal

- *Job 3456 is two hours from deadline. Please expedite and call the client to manage expectations if you feel it is going to …*
- *A new order has come in from….*
- *XYZ has 3 people booked on it with 2 days to go. Break even is 8.*
- *New Job Instruction: Please would you perform an asbestos inspection on Unit 33, broadwick Ind.Est…….. The contact is Mrs….*
- *I have not received your expenses from*
- *You have three outstanding support calls in your section which have not been allocated to a consultant.*

Costs and benefits

- **Costs**
  - set up and training £9,950 (or £8950 excluding email attach and data migration) plus
  - annual fees for RTU, upgrades and support services £1200 (£2400 with email attach).
- **Benefits**
  - Increased productivity.
  - Reports automatically produced
  - Less staff time for servicing growing request volumes.
  - Security

Thank you