Offline Access Is the Key to Unlocking Mobility's Promise

WITH SMARTPHONES AND TABLETS NOW STANDARD-ISSUE OFFICE GEAR, workers fully expect to have mobile access to critical data and business applications wherever and whenever the need arises. But for enterprise applications managing critical business information—applications for areas such as enterprise content management (ECM), case management, business process management (BPM) and customer relationship management (CRM)—mobile access is only part of the equation. To best serve business users, these enterprise platforms must deliver offline capabilities to support persistent access to information and seamless workflows in the absence of connectivity and without any heavy lifting on the part of end users.

The rise of mobility is a perfect complement to enterprise tools such as those for ECM, providing workers with the flexibility and freedom to tap into critical document management, e-forms, workflow and reporting functionality from wherever they're working. In a recent IDG Research survey, nearly three-quarters of the respondents ranked mobile access to critical documents as the most important capability of an ECM solution.

Demand for mobile access to ECM and other enterprise applications is mounting as companies recognize the potential for streamlining critical business processes. For example, mobile access to ECM enables far-flung workers to more effectively collaborate while arming them with the right information to improve decision-making in the field. Moreover, mobile access to core enterprise platforms ensures that work gets done faster while minimizing rework and errors, since employees can tend to critical business tasks remotely, without direct access to their desktop environments.

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Consider case workers who are required to make quick decisions out in the field. With mobile access, these workers can review critical documents on pending matters on the spot, as opposed to having to wait to get back to the office before initiating any action. Similarly, claims adjusters can upload images of damaged vehicles or property losses to facilitate payment authorization on claims, and there are countless other examples that span multiple industries—from field technicians tasked with inspecting onsite industrial equipment to home healthcare providers requiring instant access to a patient's full medical history at the point of care.

And it's not just the average field worker or sales rep who stands to benefit from remote access to critical business documents, files and data. The IDG survey found that 61 percent of the executive managers, including C-level and senior management, saw value in accessing critical business data while offline via their mobile devices, as did respondents in several other roles, including consultants, attorneys, service technicians and human resources and marketing personnel.

OFFLINE CAPABILITIES: A KEY PART OF THE MIX

Despite the potential productivity benefits for workers as well as executives, solutions lacking offline capability dilute the value proposition of full mobility. Mobile-based platforms without offline functionality require users to engage in time-consuming and kludgy workarounds to gain access to critical data and documents, since Internet connectivity isn't always a given and bandwidth can vary by geographic location.

In fact, workers traveling to areas where an Internet connection or broadband connectivity is spotty or nonexistent take a variety of steps to ensure that they're properly prepared. The most widely used tactic is to print out hard copies of required documents beforehand—a workaround cited by over 70 percent of the survey respondents.

Even when Internet or broadband connections are available, it's not always possible to link directly to the corporate network. Here again, the onus is on field workers and executives to find workarounds for accessing and saving critical files and data remotely if their mobile-based tools are not equipped with offline capability.

By far the most popular solution is for workers to e-mail critical files to themselves or to colleagues, which was how 62 percent of the US respondents to the survey said they address the problem. Nearly half (47 percent) said they would store a file or document locally on a device, and 44 percent choose to load up a USB stick or some other type of external drive to save and transport critical material to and from the office. (There were slight differences in the APAC region, where 59 percent of the respondents reported a preference for saving data and files remotely on a USB stick or an external drive.)

In addition to the workarounds required for remote access, even more manual effort is required once the connection to the corporate network is restored. Without a persistent connection between the mobile device and the corporate network, on-the-go employees are faced with manually rekeying information and data into corporate systems once they return from field work or travel outside of the office.

According to the survey, nearly half of the respondents (48 percent) copy and paste whole files or documents into corporate systems, 39 percent download data from external drives and 36 percent retype recorded data into the primary business systems. Regardless of the approach, the efforts are labor-intensive and time-consuming. Respondents to the survey reported spending an average of 45 minutes to complete such tasks—time that could be better spent on higher-value business activities.

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Not only are these manual workarounds time-consuming and a distraction from core business tasks but they also raise concerns about security risks and data integrity. Over 70 percent of the survey respondents expressed concern about data loss or data corruption when employees transfer information recorded offline back into company systems, since they estimate that approximately 15 percent of that data is inaccurately entered. Moreover, 67 percent of the respondents had concerns about possible security breaches if information was lost or stolen.

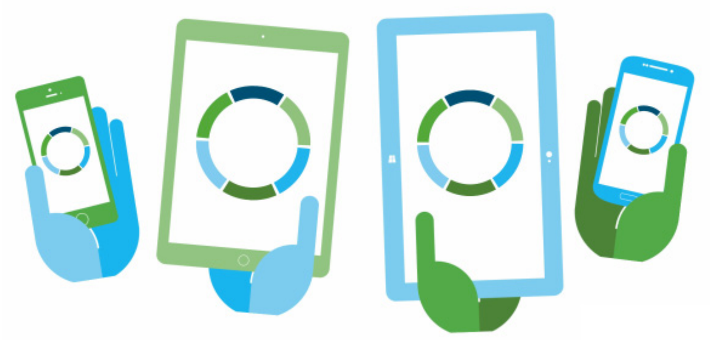
Mobile-based enterprise solutions such as ECM applications that are built from the ground up to address such offline scenarios raise the bar on productivity for workers conducting business from their devices. With offline capability, a mobile ECM tool or other enterprise platform enables employees to remain productive in their core workflow when they're outside of the office—without any cumbersome prep work and freed from the burden of having to manually rekey data or navigate download procedures.

With such flexibility, attorneys or sales reps can easily gain access to critical contracts and case files in an airport on their mobile device and continue working while on a plane, avoiding costly downtime and eliminating the need to gather essential materials prior to their trip. Field service representatives called to a customer site for a support visit can update records at the point of service. Doing so eliminates repetitive manual entry work, and information is accurately entered into the enterprise systems, which, in turn, promotes customer satisfaction while optimizing overall support costs.

Home healthcare workers are also prime candidates for leveraging the added benefits of offline capabilities in a mobile-based enterprise tool such as ECM. Professionals calling on patients in rural areas lacking Internet connectivity would not be hindered from getting remote access to medical records; they could also update patient files at the point of care, as opposed to having to rekey data at a later date.

The desire for offline capabilities in a mobile-based enterprise platform isn't limited to these few roles. The IDG survey found that the vast majority of the respondents, regardless of job title or industry, find it valuable to access company documents and information when they're not connected to the Internet or corporate network, and three out of five respondents found the requirement to be critical or very important.

Beyond mobile access to documents and files, professionals want to be able to initiate and work through common business processes while on the go. Seventy-seven percent of survey respondents said the ability to start common business processes like field reporting or customer intake would be advantageous while working remotely in lieu of waiting to return to an office environment. Moreover, 76 percent of the respondents said the ability to automatically synchronize work that was recorded offline would vastly improve their user experience and facilitate productivity.



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ADDRESSING THE OFFLINE CHALLENGE

To ensure full productivity in the absence of connectivity, mobile-based platforms such as ECM need to go beyond mere mobile information access or providing simple file sync and sharing capabilities. Instead, the optimal solution is an offline "briefcase" capability that replicates users' environment, enabling those people to experience the same workflow patterns, whether or not they're connected to the corporate network.

Hyland Software has a strong mobile heritage, with its OnBase ECM offering, serving up mobile access to information since 2009, initially for the BlackBerry and then in 2011 as the first vendor to natively develop mobile apps for the iPad, iPhone, and Android and Window devices.

OnBase's vision for mobility goes well beyond accessing key files and documents on the road, however. A pioneer in offline access, Hyland has been delivering the Unity Briefcase function for Windows-based systems since 2009, enabling users to continue work even when they have no network connection. The latest OnBase 16 service pack includes a new Mobile Briefcase function designed specifically for Windows tablets and iPads.

OnBase's critical offline capability automatically pushes content to a mobile briefcase, which users can access at any time to review or update documents, fill out forms or upload photos while offline. With this offline capability, users can jump-start processes that depend on offsite data collection, eliminating delays that can result from duplicate data entry or missed paperwork.

Once a network connection is reestablished, the Unity Briefcase function automatically syncs the material created or modified offline with the OnBase server, without worker intervention and without any risk of overwriting work. Because the OnBase server manages the central repository, there is no risk of information loss in the event a device is lost and needs to be wiped. Moreover, the server manages all configuration information, so mobile access to enterprise content is handled in accordance with OnBase's user rights, ensuring security and compliance.

For First Choice Home Health & Hospice, OnBase's offline briefcase function was a key selling point for the ECM solution, according to Beau Sorensen, the company's chief operating officer. First Choice's 120 clinicians, who call on residences and healthcare facilities spread across a 3,600-square-mile area in Utah, are in the office an average of only one to two hours weekly. However, they still need regular access to critical patient information during the course of their day, even when they don't have Internet access or cellular coverage, Sorensen says.

The firm's traditional processes, based on paper charts, were not compliant with HIPAA—not to mention cumbersome and time-consuming, since workers had to print out medical histories and other relevant data before a home visit. They also didn't afford collaborating healthcare professionals access to patient information in real time, which was especially problematic due to the focus of Medicare and other payers on hospitalizations. The lack of collaboration and coordination directly resulted in higher hospitalization rates.

An ECM solution would help modernize First Choice's processes, but it couldn't be just any ECM platform. Without offline capability, the ECM system wouldn't give on-the-go clinicians sufficient access to critical patient information nor would it streamline any of the manual data re-entry processes, Sorensen explained. OnBase, with its Unity Briefcase offline feature, enabled the healthcare provider to make its clinicians more productive while dramatically improving patient care.

"Clinicians trying to work as efficiently as possible shouldn't have to do a song and dance every time they need information on a patient," explains Sorensen, who says First Choice is leveraging the offline capabilities on Windows laptops and tablets but eventually plans to add iPads as well. "With OnBase, clinicians can see what's happening with patients in real time, enabling them to deliver better care."

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> ArjoHuntleigh

The combination of OnBase's electronic e-form and Briefcase offline processing capabilities has enabled ArjoHuntleigh (part of the Getinge Group global organization) to completely replace the manual paper-based systems used by technicians doing service work in the field, says Shane Bruce, IT officer, Systems Development & Support, for the firm, which manufactures healthcare-related equipment such as medical beds and lifters. With the paper service sheets, there were issues with timely invoicing, accuracy and management of spare parts information. Moreover, the accounts departments had to decipher handwriting and contend with paperwork that sometimes just disappeared. Offline capabilities were a critical component for ECM, because technicians often operate in areas with limited or no connectivity, Bruce says.

"The offline functionality has enabled our service technicians to perform their duties seamlessly—we've integrated our spare parts price list into the offline functionality, which means that our pricing structure is consistent across the organization. Customers are always billed correctly, and it saves time," he explains. "There were no two ways about it: without offline functionality, we didn't have a practical ECM solution."

The ubiquity of smartphones and tablets has made mobility a "table stakes" feature for all enterprise applications today. However, simply providing mobile access to data and applications isn't enough to ensure full remote-worker productivity, since connectivity to the corporate network isn't always a given. Mobile-based enterprise applications in areas such as ECM, BPM, case management and CRM must go the extra mile and deliver robust offline capabilities to complete the mobile picture, providing users with a seamless work experience whether they're at their desk or in the field.

To learn more, visit OnBase.com/mobile.