



eMail Enterprise Records and Document Management System (eERDMS)  
Enterprise Form System (EFS)  
Component System Overview

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U.S. Department of the Interior

Sensitive but Unclassified – For Official Use Only

# eERDMS program vision

*Provide the Department of the Interior with a single cohesive integrated information management program designed to manage records and documents for its missions and programs to ensure public trust and transparency*



# 5 enterprise program components of eERDMS

EES – Enterprise eArchive Systems

- Captures inbound and outbound emails, including attachments

ECS – Enterprise Content System

- Provides records and content support

EFS – Enterprise Forms System

- Centralizes, standardizes and automates all internal and external forms

EDS – Enterprise Dashboard System  
*(Future)*

- Reports key statistical information

EXS – Enterprise Fax System  
*(Future)*

- Provides desktop faxing capabilities



# EFS and Transportation Subsidy

Identified need to improve and streamline the end-user experience by:

- Reducing the effort to manually process & maintain forms processes
- Reducing errors and improving data quality
- Allowing for digital and electronic signatures
- Allowing the use of all Department portable devices (i.e., iPad, iPhone, Android, etc.)



# Future Capabilities vs. Current Capabilities

Capabilities	Future Capabilities		Current Capabilities
	HTML5 Web Form	Electronic PDF	Printable PDF (Print and fill out)
Mobile Supported	✓	✗	✗
Field Level Data Validation	✓	✓	✗
Logic Based Business Rules	✓	✓	✗
Collapsible Sections	✓	✓	✗
Built In Navigation (Wizard Style)	✓	✓	✗
Save and Return	✓	✓	✗
Electronic Signatures	✓	✓	✗
In-line Help Text	✓	✓	✗
Electronically Attached Files	✓	✓	✗
Track Form Usage Metrics	✓	✓	✗
Electronic Submission	✓	✓	✗
Manual Submission (Fax or Mail)	~	~	✓
Wet Signature	~	~	✓



# EFS scope

## **Owner:**

OCIO eRecords Service Manager

## **Implementation Target Group:**

All DOI Bureaus and Offices that use / have online forms

## **EFS includes:**

- Consolidation and automation of over ~4,700 Department forms;
- Development of common repeatable processes related to workflow;
- Usage of digital and electronic signatures;
- Ability to view business trend analysis and processing metrics;
- Ability for online, offline and mobile forms processing;
- Ability to provide automated processes for external Department customers;
- Ability to utilize real-time workflow through the use of unified messaging.



# EFS complies with...

- Secretarial Order 3309;
- Privacy Act (5 U.S.C. § 552a);
- 508 Rehabilitation Act (29 U.S.C. § 798);
- The Federal Records Act (44 U.S.C. Chapter 35);
- Controlled Unclassified information (32 C.F.R. 2001);
- Federal Information Processing Standard Publication 201;
- Government Paperwork Elimination Act (GPEA). (44 USC § 3504);
- Federal Information Security Management Act (FISMA, (44 U.S.C. § 3541).



# EFS objectives

- Consolidate all internal and external departmental forms
- Centralize forms services to a single dynamic portal
- Provide unified forms formats and functions across the Department by consolidating individual Bureau forms systems into a centralized department forms program;
- Provide automation for all internal and external Department forms;
- Provide mobile, online and offline automated forms processing;
- Support application development such as on-boarding , telework, employee exit and badging;
- Provide real-time business metrics, trends analysis, and auditing
- Tie forms processing and forms information to Departmental Manuals within the Electronic Library of Interior Policies ([ELIPS](#)).



# EFS Benefits

## Strategic

- Meets the Department's objective for common automated forms processing
- Replaces the need for Correspondence Tracking System

## People

- Reduces the effort to manually process & maintain forms processes
- Reduces the effort to address data calls for metrics
- Reduces errors and improves data quality
- Provides advanced business logic to evaluate performance

## Process

- Enforces a common forms lifecycle process for the Department
- Includes metrics, reporting, queries, auditability
- Standardized data capture & storage
- Addresses information governance and records management



# EFS Benefits (continued)

## Technology supports

- Common Forms BPM Tool for the Department
- Forms workflow process to completion
- Other programs such as training, compliance, reporting etc.
- Digital and electronic signature
- All Department portable devices
- Rapid development initiatives
- Artificial intelligence
- Multi-business system integration

## Savings

- Eliminates manual forms handling – routing, scanning, storing, retrieving, reporting
- Eliminates manual signing
- Eliminates lost forms
- Eliminates response latency
- Eliminates individual procurements for forms licenses
- Consolidates forms licensing to take advantage of volume pricing



# Form Types – Wizard (Sample)

DI-1935.1 06/2011



**Dept Name**  
**Form Title**  
*Notes below title area*

OMB Control No. 1090-0002  
Expiration Date 06-30-2012



General Example: File Form W-2G for every person to whom you pay \$600 or more in gambling winnings if the winnings are at least 300 times the amount of the wager. If the person presenting the ticket for payment is the sole owner of the ticket, complete Form W-2G showing the name, address, and TIN of the winner. If regular gambling withholding is required, the winner must sign Form W-2G, under penalties of perjury, stating that he or she is the sole owner and that the information listed on the form is correct.

## Menu

Applicant Information

▶ Survey Questions

Sample Object Types

## PART 2. Survey Questions

### How did you learn about this position? (check all that applies)

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Private Information Service | <input type="checkbox"/> Private Employment Office         | <input type="checkbox"/> School or College Counselor       |
| <input type="checkbox"/> Magazine                    | <input type="checkbox"/> State Employment Office           | <input type="checkbox"/> Friend or Relative in Agency      |
| <input type="checkbox"/> Newspaper                   | <input type="checkbox"/> Agency Personnel Department       | <input type="checkbox"/> Friend or Relative Outside Agency |
| <input type="checkbox"/> Radio                       | <input type="checkbox"/> Agency or Other Federal Recruiter | <input type="checkbox"/> Internet or World Wide Web        |
| <input type="checkbox"/> TV                          | <input type="checkbox"/> Job Information Center            |  |
| <input type="checkbox"/> Other (Please Specify)      |  |  |

◀ Previous

Next ▶

Submit

HTML5, support full mobility, online digital and electronic signature, error checking, remote lookups, multi-user interface.



# EFS Portal – Main Page

The screenshot shows the main page of the EFS Portal for the Department of the Interior. At the top left is the Department of the Interior logo, and to its right is the text "Department of the Interior". On the top right, it says "Welcome, tmurphy" and "Logout". Below this is a navigation bar with icons and labels for "Home", "Forms", "Tasklist", "History", "Account", and "Change Password".

The main content area features three large icons with corresponding text:

- Forms**: View available forms and start filing them in.
- Task List (1)**: Complete your saved draft forms and tasks.
- History**: View the history of forms you have submitted.

A callout box titled "Forms" provides additional information:

**Forms**  
This is where you will be able to browse the forms available to you and start filing in new forms. If this is your first time then start here.

**Quick Links:**

- BIA-1076-0062 - Application For Job Placement
- BIA-1076-0062 - Wizard
- DI-3457 - Teleworker Form
- NPS-1034-0030 - Annual Products Report for CLGs



# Employee / User Task List

The screenshot shows the Department of the Interior web application interface. At the top left is the Department of the Interior logo, and to its right is the text "Department of the Interior". On the top right, it says "Welcome kmurphy" with a "Logout" button. Below this is a navigation bar with icons and labels for "Home", "Forms", "Tasklist", "History", "Account", and "Change Password". The main content area features three large cards: "Forms" (with a document icon), "Task List (1)" (with a checkmark icon), and "History" (with a clock icon). Each card has a brief description of its function. Below the "Task List (1)" card is a callout box with the following text:

**Task List**  
This is where you will be able to find the forms that you have saved but not yet submitted. You will also see any form related tasks assigned to you in this section.

**Quick Links:**

- Complete your DI-3457 - Teleworker Form



# Detailed Task List

The screenshot shows a web application interface for the Department of the Interior. At the top left is the Department of the Interior logo, and to its right is the text "Department of the Interior". On the top right, it says "Welcome kmurphy" and "Logout". Below this is a navigation bar with icons and labels for "Home", "Forms", "Tasklist" (which is highlighted), "History", "Account", and "Change Password".

The main content area is titled "Task List" and contains the instruction "Complete your outstanding forms and tasks." Below this is a search bar with the text "search" and a blue "Go" button. To the right of the search bar are "Sort:" and "Filter:" dropdown menus. The "Sort:" menu is currently set to "Form name".

Below the search and filter options is a list of tasks. The first task is "Complete your DI-3457 - Teleworker Form", which is preceded by a document icon. Below the task name is the text "Last Modified: 22 May 2013 7:26 PM". To the right of the task name is a blue "Open Form" button, and below that is a grey "Delete" button.



# Historical Tracking

The screenshot displays the Department of the Interior user interface. At the top left is the Department of the Interior logo, featuring a bison and the text "U.S. DEPARTMENT OF THE INTERIOR" and "MARCH 3, 1849". To the right of the logo, the text "Department of the Interior" is displayed. Further right, the user is greeted with "Welcome kmurphy" and a "Logout" button. Below this is a navigation bar with seven items: "Home" (house icon), "Forms" (document icon), "Tasklist" (checklist icon), "History" (clock icon), "Account" (person icon), and "Change Password" (key icon). The main content area is divided into three columns. The first column is titled "Forms" and includes a document icon and the text "View available forms and start filling them in". The second column is titled "Task List (1)" and includes a checklist icon and the text "Complete your saved draft forms and tasks". The third column is titled "History" and includes a clock icon and the text "View the history of forms you have submitted". Below these columns is a "History" section with a title "History" and the text "This is where you can review the forms you have completed and submitted." Underneath is a "Quick Links:" section with a single entry: a clock icon followed by "14 Jun 2013 7:13 PM - BIA-1076-0062 - Application For Job Placement".

