MAX.gov

Cloud Services Capabilities

Sponsored by the Budget Formulation and Execution Line of Business (BFELoB)

November 6, 2015
The Budget Line of Business:
Ten Shared Services as Common Solutions

**Analytical Tools**

**Collaboration**

**Data Collection & Tracking**

**Document Production**

**Knowledge Management**

**Generally Applicable Government-wide Services via MAX.gov**

**Agency Budgeting Tools**

**Budget Execution and Financial Management Integration**

**Budget Performance Integration**

**Human Capital** *(Federal Budgeting Profession)*

**Program Management** *(Coordination, Standards, Architecture)*

**Budget Formulation and Execution Specific Services**
## Collaboration, Content Management, Knowledge Management (1,000’s)

- **DOD** - Air Force Health Futures Group, Futures Based Agile Thinking
- **DOD** - Navy BUMED Health and Medical KM, Operation TOMODACHI, Responder Safety
- **DOJ** - Congressional Reporting, Federal Knowledge Managers Community of Practice
- **DHS** - FEMA - Hurricane Sandy, National Continuity Programs
- **EPA** - Region 8 Tribal Partnerships
- **GSA** - E-Gov Travel Service, FedRamp, Web Content Managers
- **HHS** - HAITI Health Facilities
- **NASA** - OCFO Collaboration and Knowledge Management
- **OMB** - President’s Budget authoring; Collaborations, Data Calls, Intranet; 2008 Presidential Transition
- **OPM** - Human Capital Community, Hiring Reform, Diversity & Inclusion, Chief Learning Officers
- **USTR** - Trans Pacific Partnership; US Trade Advisory Committee

## Data Collection, Tracking, BI Analytics, Publications (600+)

- **CEQ** - Green Sustainability (Executive Order 13514)
- **DOD** - Navy BUMED Force Health Protection Emergency Management, Contract Management & Budgeting
- **DOJ** - Congressional Questions for the Record; Performance Reporting
- **DHS** - Cyberscope authentication (HSPD-12 PIV/CAC)
- **GSA** - Federal Internet Domain Usage; Networx (FTS 2001) Implementation
- **OGE** - Stock Act Reporting
- **OMB** - President’s Budget Chapters, 150+ Data Calls incl. Qs&As, QFRs, Crosscuts, Sequestration
- **ONDCP** - Annual National Drug Control Strategy
- **Treasury** - ECIPC Shared Service

## Websites (both Public Facing and Controlled Access)

- **E-Gov** - CxO.gov websites, Federal Permitting, Uncle Sam’s List
- **Earmarks.gov**
- **OPM** - Shared List of People With Disabilities
Government-wide Scope
Plus Non-Federal Partners

<table>
<thead>
<tr>
<th>Federal Government-to-Government</th>
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<tr>
<td>Intra-agency</td>
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<tr>
<th>Legislative and Judicial Branches</th>
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<tbody>
<tr>
<td>Non-Federal (Enclaves)</td>
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<tr>
<td>Non-Governmental Partners</td>
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</table>

- **The Public**
  - Used for inter-agency, intra-agency, and government-wide activities
  - Interactions with state, local, tribal, territorial, international, and non-governmental partners in secure *Enclaves*
Collaboration & Information Sharing
- MAX Federal Community
- MAX Calendar
- Online Meetings, MAX Shared Desktop

Data Collection, Analysis, Publications
- MAX Collect, MAX Analytics, Modeling
- MAX Publishing
- MAX Survey

Specialized Applications
- A-11 (President’s Budget), Appendix Text, Apportionment, Monthly Outlays, Earmarks, Stock Act, Uncle Sam’s List, CIO.gov, Permitting, IT Dashboard, ...

Identity & Provisioning
Common Database
Web Frameworks
Workflow
Business Intelligence
Publishing
Records Management
Platform as a Service (PaaS)

Agility and cost effectiveness through reusable modular web services, open source, open standards, and web-oriented APIs.

Many more…
MAX Authentication Services
150,000+ Users, 180 Agencies, 45,000+ PIV/CAC Cards at 110 agencies

- Automatic registration for federal users by email domain
- HSPD-12 PIV / DOD CAC cards and SMS 2-factor for sensitive activities
- Enterprise Federated Partner Automated Login (i.e. single sign-on) with agencies
- Usable by non-MAX.gov systems as a cost-effective service (e.g. Cyberscope, Data.gov, many others)
Wide Ranging Technology Stack
Open Source, GOTS, Low Cost COTS

Identity Management & SSO

Collaboration Social Networking

Analytics

Data Collections & Surveys

Web Meetings

Remote Desktops for Telework

Federated Search

Wiki & Web Content

Document Management

Document Publishing

Government-wide Directory

SharePoint (API)

Microsoft Document Services (MDS)

OpenLDAP

MySQL

DB2

elasticsearch
Better Results Through Agile Development

**X** Traditional “Waterfall” Model = Full Requirements Upfront

- Conception ➔ Design ➔ Construction ➔ Testing ➔ Production Implementation ➔ Maintenance

- Result: Long delivery times and high risk of project failure

More than 75% of IT projects are late, over budget, or do not meet business requirements

**VS.**

**✓** Agile Model = Rapid Iterative Development

- Rapid Evolutionary Development using Sprints ➔ Iterative Adaptive Response to Real User Experience

- Result: Shorter delivery times, lower risks, higher relevancy

Requirements are validated by real users -- mistakes are identified and corrected early
Click on the Agency, Government-Wide Community, or Cross-Agency Collaboration you are interested in.

### Government-Wide Communities
- Acquisition
- Budget
- E-Government
- Financial Management
- Grants
- Homeland Security
- Human Capital
- IT Infrastructure
- Management
- Open Government
- Performance
- Planning

### Cross-Agency Collaborations
- Federal Credit Policy Council (FCPC) Home
- Federal Records Officers Network (FRON)
- Hurricane Sandy Rebuilding Task Force
- Information Collection Request, Review and Approval System (ICRAS)
- Infrastructure Projects - Permitting and Review
- Leading EDGE
- Partnership for Sustainable Communities
- Service First - Working Together...
- SFEB HR Training Committee
- Trade Promotion Coordinating Committee (TPCC)
- Undo Sam’s List

### About the MAX Federal Community
Each Agency Has Its Own Space with Its Own Logo, and both Internal & Interdepartmental Collaboration Areas
Rich Collaboration and Content Management Features

Flexible Access Restrictions
- Any combination of users and MAX Groups

“Find” feature to easily locate users and content in multiple ways

Extensive Help Section

“Breadcrumb” trail to easily trace your steps

Favorites Pages

Recently viewed & updated pages

Fully-Indexed Search with advanced facets

Watch Any Page (or family of pages) to be notified of activity via email
MAX Search

Advanced Filtering To Locate Specific Content

- Select particular content types

- Target search through advanced filtering:
  - title/filename
  - within page area
  - additional terms within results
  - location
  - date range
  - user
  - keywords/labels
MAX Groups: Dynamically Managed Web 2.0

Membership lists for Access Control, Email, more...

- Use MAX Groups to restrict access to pages and exercises
- Function as dynamically updated Distribution Lists
  - Cross-agency DLs
- Self-administered & managed
MAX Calendar

Enhance and organize group activities
Simplify cross-agency meeting scheduling

• Robust group collaborative calendaring across organizations
  ➢ Multiple color-coded group calendars respect group permissions
  ➢ “Subscribe” to get iCal notifications of new events and changes

• Synchronize your personal agency calendar to your MAX Calendar
  ➢ Securely publish ‘free/busy’ or “detail” information to MAX Calendar
  ➢ Allow other users and MAX groups to see either your ‘free/busy’ or calendar details
  ➢ Display multiple individual and group calendars to use as a scheduling assistant

• Specialized Calendar-based data collections
  ➢ Custom date/time-centric data collections with scheduling, tracking, and analytics
Direct Editing of Documents in MS Office Applications

Direct View & Edit
Files Viewable while Being Edited by Others

All File Versions Remain Available
(with attribution & date)

Compare Previous Versions
(Retroactive Track Changes)
Document Assemble

Document Assemble

- Assemble (i.e. combine) multiple Word, Excel, PDF, image, and PowerPoint into a single integrated Word document
- Documents to be assembled can be located on the same or different Community pages

Document Compare (Merge)

- Compare multiple Word documents against a starting document; Merge them into a new document
- Track Changes (with attribution) will highlight differences
Create Drawings & Diagrams On Any Page – Use to Navigate to Other Content
Multi-stage Workflow Process For Reviewing and Tracking

Move Document Through Review Stages Using Simple Buttons

Status: Author Draft

<table>
<thead>
<tr>
<th>Status</th>
<th>View</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send for Branch Review</td>
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<td>Branch Official</td>
</tr>
<tr>
<td>Send for Division Review</td>
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<td>Send for Agency Review</td>
<td>Author, Branch Official, Division Official, Agency Official</td>
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<td>Send for Author Re-Draft</td>
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</table>

Track Status of All Documents or Projects Automatically

Documents In Branch Review
- Document A
- Document F
- Document N

Documents In Division Review
- Document C
- Document R

Documents In Agency Review
- Document B
- Document N
- Document Q
- Document X

Documents Approved
- Document L
- Document M
- Document Y

Author Re-Draft
- Document O
- Document Z
Discussion Forums

Use the forum template to set up a discussion area in Community

- Create new topic threads
- Dynamic discussion list dashboard
RSVPs for Events and Meetings

- Effortlessly develop attendee/participant lists
- Users self register easily – automatically fills in contact information
- Instant email distribution list
- Automatically allocate limited resources with automated waitlist
- Sends out calendar invitations to personal calendars
Government-wide Directory of all MAX Users with Quick Search

1. ...

2. ...
MAX Collect, MAX Analytics, MAX Publication, MAX Survey

Integrated Government-wide data collection, tracking, analytics, publications, surveying
Data Collection, Analysis, & Publication
The Challenge

- Data collection exercises can be large and complex
- Require quick turnaround, input from multiple organizations
- Workflow with multiple levels of review (stages and roles)
- Diverse Analysis and Publication requirements
- Integrate information from other exercises and sources

The Old Way

- E-mailed Word/Excel Templates
- Manual compilation
- Reediting to restore original format
- No workflow or tracking capability
- Version control is problematic
- Manual Table of Contents (or none)
- No index or search capability
- No analytical capability
- Revisions are a huge problem

The MAX Collect Way

- Web-based distributed collection
- Automated compilation
- Instant publication: PDF, Word, Excel
- Multiple stage workflow
- Custom camera-ready formats
- Paginated table of contents
- Fully indexed and searchable
- Real-time analytics, dashboards, reports, faceted search, microsites
- Easy to re-use/repurpose content
600+ Exercises To Date
Both Major Data Collections and Quick Data Calls

Examples

• OMB’s Budget Briefing Book (over 500 questions, 1,000 pages, 160 enterers)

• **Aid to State & Local Governments** (President’s Budget, FY 2013 Analytical Perspectives Ch.17)

• **Cuts, Consolidations, and Savings** (President’s Budget FY 2013, 120 pages)

• FEA Enterprise Architecture Segment (20 data elements, 61,000 rows)

• Federal Internet Domain Usage (1,800 domains, 2,000 pages, 220 enterers)

• Green Sustainability Survey (80 questions from 86 organizations)
Each Data Collection Can Be Tailored Using a Broad Range of Options

Multiple Content Types (sections)
- Bulleted lists
- Two Types of Paragraphs:
  - Unformatted (with change history)
  - Rich Text
- Tables
  - Can be large
  - Can include data custom validations
  - Fixed and Flexible Formats
- Attachments (for including existing content, complex displays, images)
- Comments
  - Non-printable and printable
  - General or section specific
  - Custom viewing permissions
- Contacts
- In-line real-time data reports and charts based on data from multiple sources

Flexible Workflow and Access Controls
- Workflow reflects each stage of the exercise.
- Access permissions can be customized for each workflow stage:
  - Authoring
  - Review
  - Collaboration
  - Final Review
  - Publish
- Access Permissions can also be set for each topic level:
  - Exercise
  - Category and Subcategory
  - Individual Item/Topic/Question
- Permissions can be grouped into “Roles” using any combination of MAX “Groups” and individual users.
- Workflow can be managed at any topic level by Stages and Roles.
Example: Fully Paginated Table of Contents & Indexed Categorizations

DEBT

What is the debt level of the U.S.? When will an increase in the debt limit be needed? ......................22
How much of U.S. Treasury debt is owned by Foreign Governments? ......................23

ECONOMY

What is the outlook for the economy? ......................25
Does the Administration have an unduly optimistic view of the economic outlook? ......................27
Why doesn’t the Administration recognize that the economy is in a recession? ......................28
With the slump in the economy this year, why have FY 2008 receipts increased compared with their projected level in the FY 2009 Budget? Why are total receipts over the budget window (FY 2008-2013) up by $4 billion compared with the FY 2009 Budget projections? ......................29

TAXES

Why is the Administration so insistent on providing more and more tax relief to the rich when the middle class and lower income Americans are struggling? Why are you against making the rich pay their fair share in taxes to reduce the deficit? ......................30
What is the Administration proposing to do to reduce the $345 billion tax gap? ......................31

... and Full-Text Search

What word or phrase would you like to search for?
Earmarks

- Whole words only
- Case-Sensitive
- Include Bookmarks
- Include Comments

Search
Example: Briefing Book with Bulleted Talking Points, In-line Table and Chart

SPENDING/BUDGET PROCESS REFORM
Discretionary Caps - Categories and Adjustments

Question: What is the expected impact of the program integrity cap adjustments?

Talking Points:

- Cap adjustments provide an effective way to ensure that limited resources are allocated to activities with a proven track record of reducing payment errors and generating program savings.
- All of the activities that would be funded under the cap adjustments have a positive return on investment (ROI), in some cases as high as $10 of savings for every $1 invested.

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<th>(BA in millions)</th>
<th>2001 Actual</th>
<th>2008 Request</th>
<th>2008 Enacted</th>
<th>2009 Request</th>
<th>2009 Change from 2008 (+/- %)</th>
<th>2009 Change from 2001 (+/- %)</th>
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Historic Bank Failure Rates
(Failed Assets/Total Bank Assets)
## Table 18–2. TRENDS IN FEDERAL GRANTS TO STATE AND LOCAL GOVERNMENTS

(Outlays in billions of dollars)

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<td>A. Distribution of grants by function:</td>
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<td>35.7%</td>
<td>47.3%</td>
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<td>17.6%</td>
<td>17.0%</td>
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<td>44.5%</td>
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<td>18.2%</td>
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<tr>
<td>Total</td>
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<td>100.0%</td>
</tr>
</tbody>
</table>
Example: Faceted Search Navigation
OPM Shared List of People with Disabilities
MAX Survey – 1,000+ Surveys

Easy-to-use web-based surveys with unique capabilities for government use

- Wide selection of survey question types including conditional sections and customized templates
- Capable of large scale and high-volume
- Wide variety of survey modes:
  - Anonymous links – either unrestricted or limited to specific groups
  - Individualized (“tokenized”) links:
    - Customized invitation emails, response tracking, and targeted follow-up
    - Can require user login for more security
    - Results can be anonymous, fully attributed, or retain only meta-data
- Results can be dynamically displayed in real time dashboards and integrated with other data sets using MAX Analytics
- FISMA and Section 508 compliant
- Analyze and visualize data from MAX Collect and other data sources
- Easy-to-use interface for queries, reports, 3D Charts, and Graphs, GIS mapping
- Data Cube functionality allows users to “slice and dice” data for real time analysis and review
- Publish Output in multiple formats, including PDFs, spreadsheets, and HTML with dynamic drilldown
- Dynamically integrate into the Community and other web dashboards
Knowledge Management: A Natural Extension of Using MAX

For Knowledge Management to be effective, content must automatically be maintained as part of the organization’s normal daily activities!

- By using the MAX Community, MAX Collect, and MAX Analytics for information sharing, collaboration, data collection, analytical, & publishing activities, the knowledge content base automatically accumulates.
- The Community’s powerful capabilities for organizing and multi-purposing content can then transform this content into organizational knowledge.

**MAX Community**
- Pages
- Documents (attachments)
- Comments
- Diagrams

**MAX Collect, MAX Analytics**
- Data (textual & numeric)
- Charts & Graphs
- Faceted Search
- Publications
- Reports

Gardening
Organizing
Multi-purposing

Knowledge
MAX Shared Desktop: Advanced Collaboration & Virtual Desktop

- Enables multi-user collaboration & authoring
- Use for Telework, enhances Conference Calls
- Completely isolated environment with a virtual Windows desktop
- Use on iPad, Android, Netbook or other limited software device to run Office and other applications
- Custom configurations can be tailored for specific agency needs
- 3,000+ users have hosted over 20,000 meetings
MAX Vision and Roadmap: Government-wide Advanced Collaboration, Data Collection, Analytics

Core Services
- FISMA compliant secure hosting facility
- Self-service user provisioning
- Gov’t-wide user profiles, identity
- Gov’t-wide SSO
- Delegated administration
- Multi-agency Directory Service
- Virtual desktops for Telework
- Device-independent Functionality (Mobile / Tablet)
- Federated Search
- Location-based Functionality (Content / Apps)

Content Sharing, Social Information Management
- Advanced Groups
- Enterprise wiki & comments
- Document management
- Content privacy rules
- Portal & Microsites
- Mashups
- Simultaneous Editing
- E-mail-Integrated Collaboration
- Images, audio, video streaming
- Digital Rights Management for documents

Data Collection & Publications, Surveys
- Gov’t wide configurable data collections
- Delegated, point of origin data entry
- Workflow and notifications
- Granular data security and tracking
- Document production, camera-ready publishing
- Advanced content navigation (faceted search)
- Surveys (both anonymous, attributed, and authenticated)
- Linked open data, semantic web

Analytics & Business Intelligence
- Reporting
- Dynamic pivot-table-like viewing
- Data Transformation (ETL)
- Business Intelligence
- Data Exploration, Analysis as a service

Social Applications
- Reporting
- Social Applications
- Reporting
- Social Applications

Real-time Collaboration
- Web Meetings & Online events
- Shared virtual desktops for collaboration
- Group and event calendaring
- Personal synched calendaring, scheduling assistant
- Instant messaging, real-time chat
- Unified Communications
- Unified Communications
- Unified Communications
- Unified Communications

Function Status Color Codes:
- Available (Best of Breed)
- Available (enhancements in progress)
- Coming Soon (1-2 years, faster w/funding)
- Envisioned (need funding)
Robust MAX Infrastructure

- FISMA compliant – C&A’d at the FIPS 199 ‘Moderate’ level
- Fully Integrated Authentication (MAX IDs and MAX groups)
  - HSPD-12 PIV/CAC login option
  - Partnerships with agencies including single-signon
  - Usable by agencies in their own applications
- Highly Agile – Readily Customizable and Extendible Platform
- High Capacity – Highly Scalable
  - Current stress-tested capacity for 250,000 users (2x current usage)
  - Straightforward expansion through clustering & federation
- High Availability – Business Continuity
  - Multiple redundant servers at two geographically separate sites
  - HADR database replication technology between sites
  - Daily snapshot of MAX Federal Community content to ensure essential content is always available
Summary

- Authentication Services (Federal & Non-Federal Partners)
- Advanced Collaboration and Content Management
- Shared Calendars (group and personal)
- Data Collection, Tracking, & Document Production
- Surveys
- Analytics and Business Intelligence
- Online Meetings and MAX Shared Desktop
- Knowledge Management
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