



# Washington State Department of Natural Resources

## **Presented by:**

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**NATURAL RESOURCES**

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# Workflow Solutions Using Salesforce1 Platform With Integration

## Washington State Department of Natural Resources

### **Presented by:**

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# Contract Management Using Salesforce1 Platform And Integration In Washington State Government

The Evergreen State



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**DNR manages 5.6 million acres of public lands that includes:**



**Forest, Range, Aquatic, And Commercial Lands**



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# These lands annually generate more than \$200 million to benefit the citizens of the state

- Public schools
- State institutions
- County services
- State Trust accounts



# Of These 5.6 Million Acres, DNR Is Steward Of 2.6 Million Acres Of State-owned Aquatic Lands.

- On behalf of the people of Washington, DNR manages the beds and shores of navigable waters.
- Geoducks



## Aquatic Lands Leasing



- Restoration Activities
- Habitat Stewardship



# After A Lean Process Review, The Aquatics Division Discovered They Needed A Solution To Resolve Inefficiencies Surrounding Their Land Lease Approval Process.

- The current workflow was a manual, paper-based process that was:
  - Slow
  - Cumbersome
  - Inefficient
  - Inconsistent
  - Not transparent



# A Solution Was Needed To Automate The Process

- By building custom workflows
- Auto-populate with data from our other business systems, including our GIS application, and the ability to use one of 1,300 different lease document templates to generate a final product



# The Successful Solution Needed To Allow The Agency To Manage Our Data And Analyze Our Workflow Process Using Dashboards To Eliminate Bottlenecks.

- Currently using multiple resources, tools, systems, and processes
- Operating in silo's
- Inconsistent products and tracking



# **Lastly, Staff Had To Be Able To Access This Application In The Field On A Mobile Device.**

- On site data and information gathering
- Use of ArcGIS data layers
- Ability to see if an encumbrance was authorized
- View adjacent authorized uses



# Contract Management Using Salesforce1 Platform And Integration In Washington State Government

- Has A Workflow Engine
- Is Cloud Based
- Functions as a Database
- Provides Business Continuity
- Provides Greater Visibility of the Department's Portfolio



# We Require A Secure Software Application For Our Thousands Of Contracts That:

- Capable of Data Integration With:
  - On premise SAP (NaturE)
  - On premise GIS application (ArcGIS)
- Auto-population of Lease Documents Templates From Data
- Esri Map Integration (connector)
- Provides analysis - Dashboards and Reports



# Data Integration With On Premise SAP (NaturE)

- Brings over data from SAP (NaturE)
- Reduces duplication
- Reduces error
- Assists with auto-population of documents.

The screenshot displays the 'Exterior Wood' authorization page within the Washington State Department of Natural Resources (DNR) web application. The interface includes a top navigation bar with the DNR logo, a search bar, and user information (Nancy Marvin). Below the navigation bar, a breadcrumb trail shows the path: Home > Activities > Accounts > Use Authorizations > Exterior Wood. The main content area is divided into several sections:

- Use Authorization Detail:** This section contains a table with fields for Use Authorization Name (Exterior Wood), Account Holder (EXTERIOR WOOD INC ATTN ROBERT BABB), Water Body (Columbia River), Area (Columbia River near River Mile 124), Site Address (2685 Index Street, PO Box 206), Site City (Washougal), Site County (Clark), Agreement Number (20-070428), Application Date (8/8/2014), District (Admin [Change]), Owner (Robert Babb), and Contact 1 (Robert Babb).
- Nature Data:** This section contains a table with fields for Nature Description (CR WASHOUGAL - EXTERIOR WOOD INC - 39Z), Contract Start (1/1/1999), Contract End (12/31/2033), Person Responsible (SHIL490), Administrator (HILGENBERG RIVERS), and Industry (RIVERS DIST).
- System Information:** This section contains a table with fields for Created By (Admin), Created Date (8/8/2014 11:54 AM), Last Modified By (Carol Piening), and Last Modified Date (9/10/2014 3:15 PM).
- Trusts/Counties:** This section contains a table with fields for Action, Trust/County Name, Trust/County, and External ID. The table shows one record for TRCO-12885, 2ND CL TIDE/SHORELND - CLARK CO.
- Measurements:** This section contains a table with fields for Action, Measurement Name, Measurement Type, Measurement Unit, Size, and Location. The table shows two records for Meas-23010 and Meas-23011, both with a measurement type of FT2 and a measurement unit of 15,246.0000. The size for Meas-23010 is Outfalls and for Meas-23011 is Total Square Footage.
- Legal Descriptions:** This section contains a table with fields for Action, Legal Description Name, Section, Township, Range, Location (Latitude), and Location (Longitude). The table shows one record for LD-16163, with a section of 17, township of 01.0, range of 04.0E, location (latitude) of 45.56995624, and location (longitude) of -122.34592360.
- ESA Codes:** This section contains a table with fields for Action, ESA Code Name, and ESA Code. The table shows no records to display.



# Using The Conga Application To Create Documents From Data For Over 1,300 Templates

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 **Use Authorization**  
**Exterior Wood**

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[+ Show Feed](#)

[Trusts/Counties \[1\]](#) | [Measurements \[2\]](#) | [Legal Descriptions \[1\]](#) | [ESA Codes \[0\]](#) | [Notes & Attachments \[9\]](#) | [Approval History \[0\]](#) | [Open Activities \[4\]](#) | [Activity History \[3\]](#) | [Use Authorization History \[1\]](#) | [Compliance Monitoring Sites \[0\]](#)

**Use Authorization Detail**

|                        |                                                                                                                        |                  |                                                                                                                                    |
|------------------------|------------------------------------------------------------------------------------------------------------------------|------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Use Authorization Name | Exterior Wood                                                                                                          | Agreement Number | 20-070428                                                                                                                          |
| Account Holder         | <a href="#">EXTERIOR WOOD INC ATTN ROBERT BABB</a>                                                                     | Application Date | 8/8/2014                                                                                                                           |
| Water Body             | <a href="#">Columbia River</a>                                                                                         | District         |                                                                                                                                    |
| Area                   |                                                                                                                        | Owner            |  <a href="#">Admin</a> <a href="#">[Change]</a> |
| Property Common Name   |  Columbia River near River Mile 124 | Contact 1        |  <a href="#">Robert Babb</a>                  |
| Site Address           | 2685 Index Street, PO Box 206                                                                                          | Contact 2        |                                               |
| Site City              | Washougal                                                                                                              | Contact 3        |                                               |
| Site County            | Clark                                                                                                                  | Contact 4        |                                               |



# Esri Map Integration (connector)

|                       |                                                                                                                                                            |                                     |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|
| Priority Level        | 1 - High                                                                                                                                                   |                                     |
| All Permits Attached? | Yes                                                                                                                                                        | Date Final Permit Received 9/8/2014 |
| Permits Attached      | Hydraulic Project Approval (HPA); Section 10 Permit; Section 401 Water Quality Certification; Section 404 Permit; Shoreline Substantial Development Permit |                                     |
| Waiting on Permit     | No                                                                                                                                                         |                                     |
| Waiting Permits       |                                                                                                                                                            |                                     |

---

▼ Maps

|                        |     |                                                                                                                                                                                                                  |
|------------------------|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Vicinity Map Attached? | Yes | ESRI Map  <a href="https://esrimaps.na11.visual.force.com/apex/Map...">https://esrimaps.na11.visual.force.com/apex/Map...</a> |
| Aerial Photo Attached? | No  |                                                                                                                                                                                                                  |

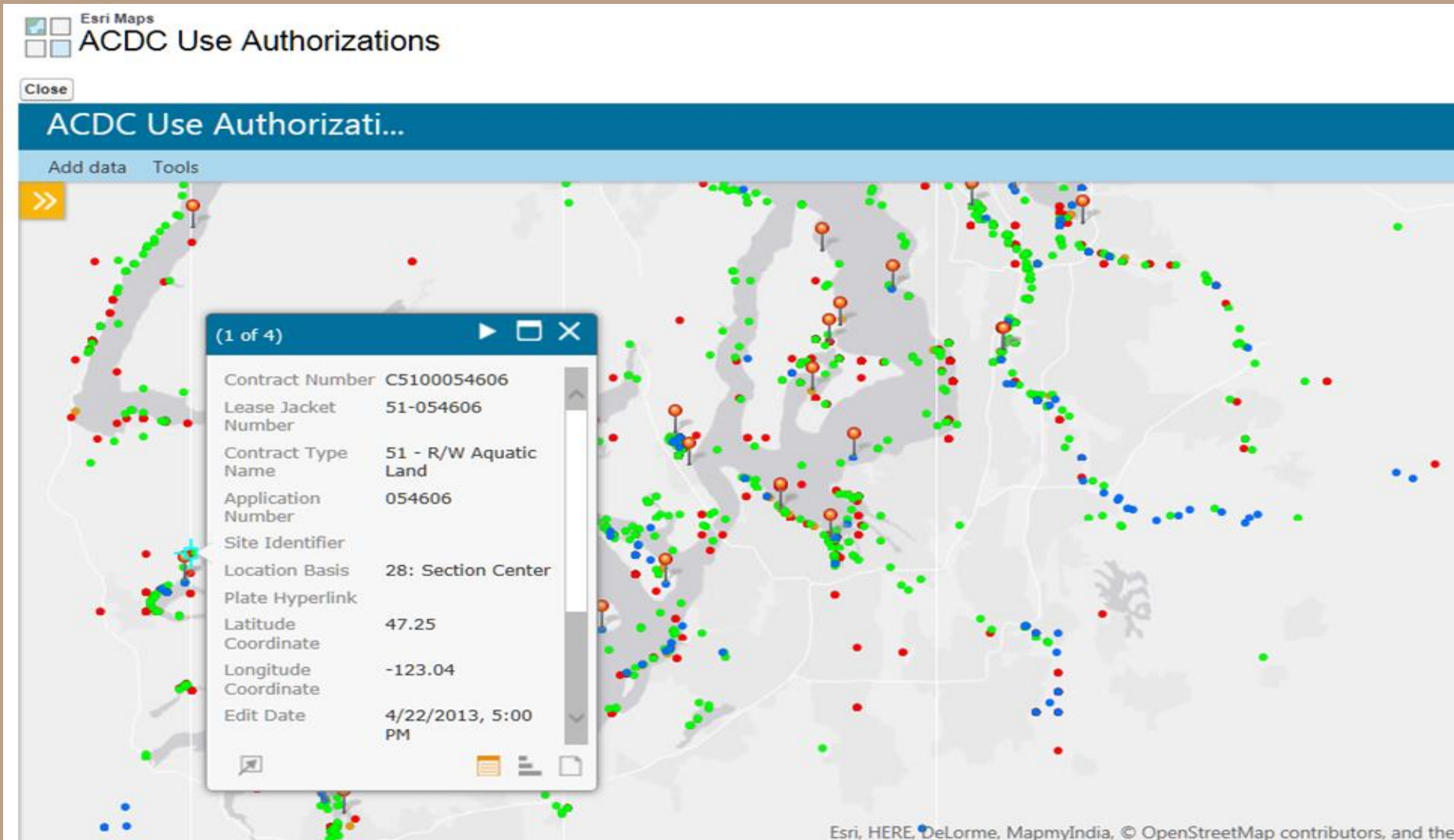
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▼ Habitat Stewardship

|                                    |                                                                                                             |  |
|------------------------------------|-------------------------------------------------------------------------------------------------------------|--|
| Needs Stewardship Review?          |  No                        |  |
| Need Habitat Stewardship Report?   | N/A                                                                                                         |  |
| Need Habitat Stewardship Memo?     | N/A                                                                                                         |  |
| No Habitat Stewardship Explanation | Consultation with the HSS has resulted in standard clauses selected for dredge removal and sale agreements. |  |



# GIS application (ArcGIS) Using the Esri-Salesforce Connector



# GIS application (ArcGIS) Using the Esri-Salesforce Connector



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Search

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Help & Training

HomeActivitiesAccountsUse AuthorizationsWater BodiesContactsReportsDashboardsFilesContentLibrariesACDC Issues+

Esri Maps

ACDC Use Authorizations

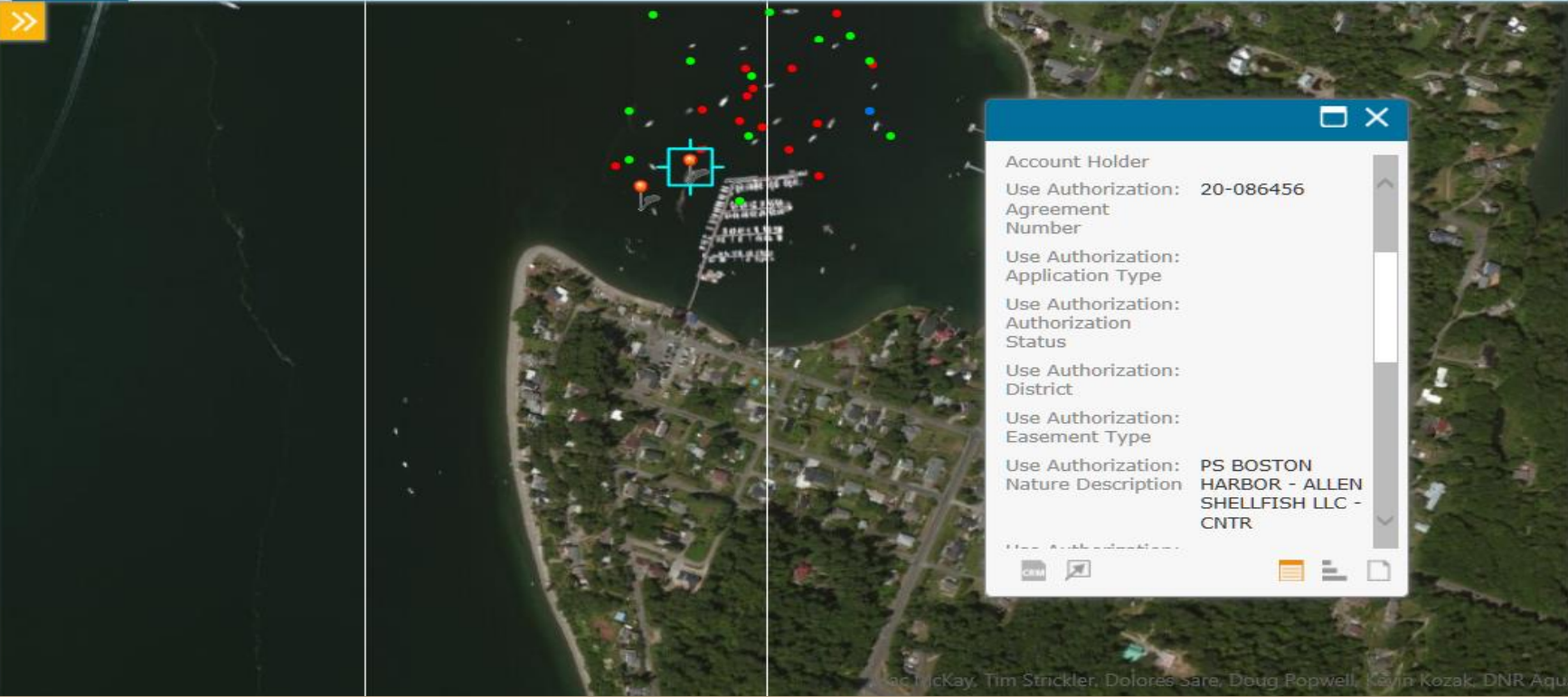
Close

Records Pane:  

ACDC Use Authorizati...

Add dataTools

>>



Account Holder

Use Authorization: 20-086456

Agreement Number

Use Authorization: Application Type

Use Authorization: Authorization Status

Use Authorization: District

Use Authorization: Easement Type

Use Authorization: Nature Description

PS BOSTON HARBOR - ALLEN SHELLFISH LLC - CNTR

Close

Powered by



Mac McKay, Tim Strickler, Dolores Sore, Doug Popwell, Kevin Kozak, DNR Aquatic Resour...

# Provides Analysis - Dashboards and Reports

- Show potential bottlenecks
- Show productivity
- Business analysis tool
- Report on deliverables
- Assess workload and backlog

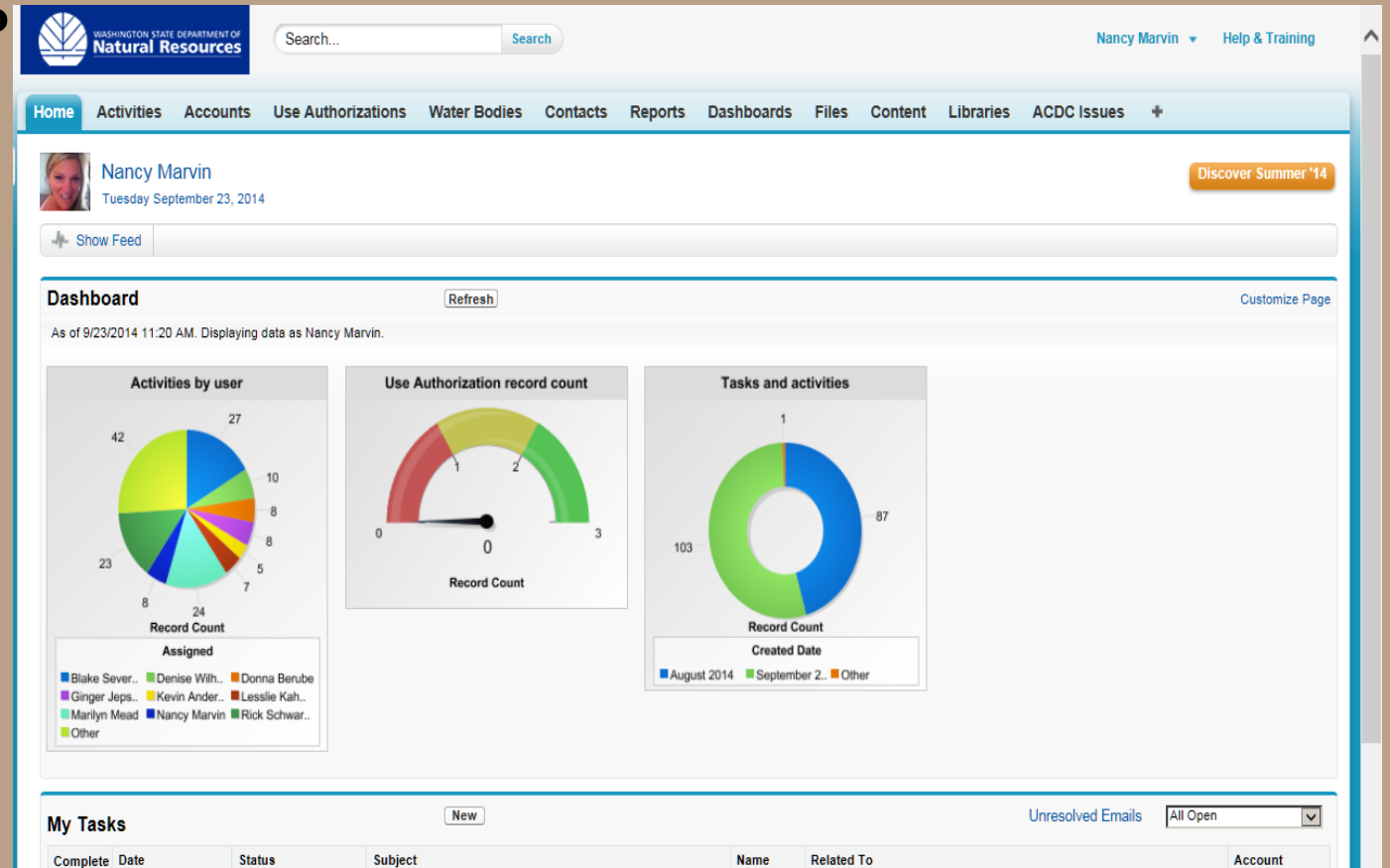
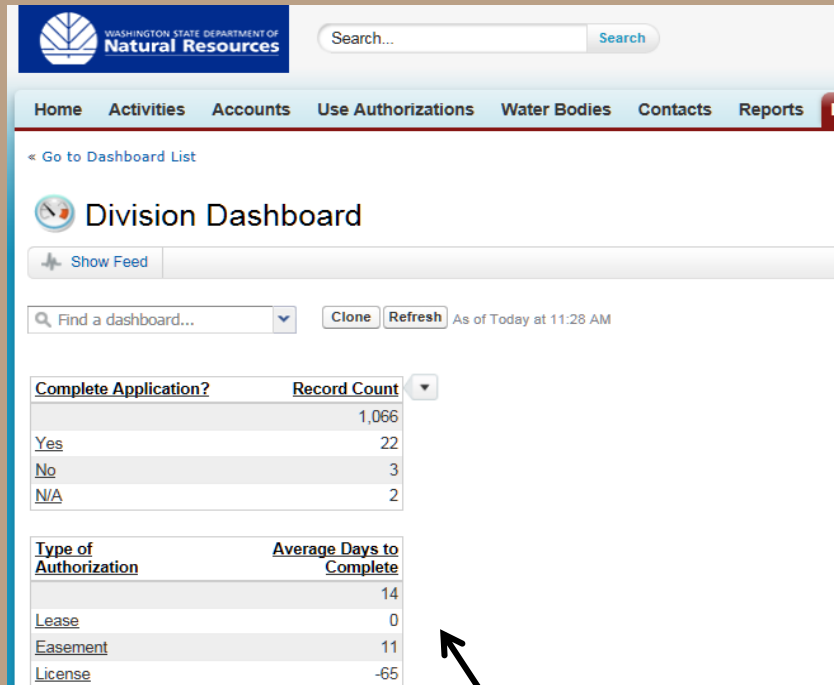
The screenshot shows the 'Reports & Dashboards' section of the Washington State Department of Natural Resources website. The interface includes a navigation bar with links like Home, Activities, Accounts, Use Authorizations, Water Bodies, Contacts, Reports, Dashboards, Files, Content, Libraries, and ACDC Issues. The 'Reports & Dashboards' page has a search bar and buttons for 'New Report...' and 'New Dashboard...'. On the left, there's a 'Folders' section with a search bar and a list of folders: 'Unfiled Public Reports', 'My Personal Custom Reports', 'My Personal Dashboards', '1) Division Dashboards', and '1) Division Reports'. The main content area displays a table of reports and dashboards. The table has columns for 'Action', 'Name', and 'Folder'. The reports listed include 'Division Dashboard', 'Created/Completed This Quarter', 'How many new have been created?', 'How many days to Fee Paid?', 'How many days to Complete?', 'How many days for Pref Rights Letter?', 'How many days Survey Received to Sent?', 'How many days Survey Sent to Approved?', 'Survey needs adjustment ratio', 'How many days from App to Final Permit?', and 'How many days for HSS Report?'. Each report has a dropdown arrow and a plus icon in the 'Action' column. The 'Folder' column shows '1) Division Dashboards' for the first report and '1) Division Reports' for the others. At the bottom, there's a pagination bar showing '1-25 of 66' and 'Page 1 of 3'.

| Action | Name                                                                                                                                                                         | Folder                 |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| ✓      | Division Dashboard                                                                                                                                                           | 1) Division Dashboards |
| +      | Created/Completed This Quarter                                                                                                                                               | 1) Division Reports    |
| +      | How many new have been created?<br>Created in Current Year                                                                                                                   | 1) Division Reports    |
| +      | How many days to Fee Paid?<br>Avg days from Application Date to Fee Paid date, for those that have paid. Current Year.                                                       | 1) Division Reports    |
| +      | How many days to Complete?<br>Avg Days to complete, for those that are complete. Current Year.                                                                               | 1) Division Reports    |
| +      | How many days for Pref Rights Letter?<br>How many days between when the Date Preference rights letter was sent and the date it was received.                                 | 1) Division Reports    |
| +      | How many days Survey Received to Sent?<br>How many days did it take between the Date the draft survey was received and the date it was sent to Olympia for review?           | 1) Division Reports    |
| +      | How many days Survey Sent to Approved?<br>• How many days did it take between the time the Draft survey was sent to Olympia for review and the date the survey was approved? | 1) Division Reports    |
| +      | Survey needs adjustment ratio<br>How many surveys out of the total surveys needed revision?                                                                                  | 1) Division Reports    |
| +      | How many days from App to Final Permit?<br>How many days from the date of application to the date final permit received?                                                     | 1) Division Reports    |
| +      | How many days for HSS Report?<br>How many days from Date sent to Habitat Steward Specialist to the Date the Habitat Stewardship Report/Memo Received?                        | 1) Division Reports    |



# Provides Analysis - Dashboards and Reports

- Keep an eye on activities using the dashboard →



Use reports to monitor workload



# The Solution

- The solution was building an application on the Salesforce1 Platform,
  - To perform analysis, view reports, understand the workflow
- Integrating it with the Esri-Salesforce connector for our ArcGIS spatial data
- An in-house built connector to our SAP business application.
- Now, staff in the Aquatic Resources program can access the entire land lease approval process in one application instead of three.

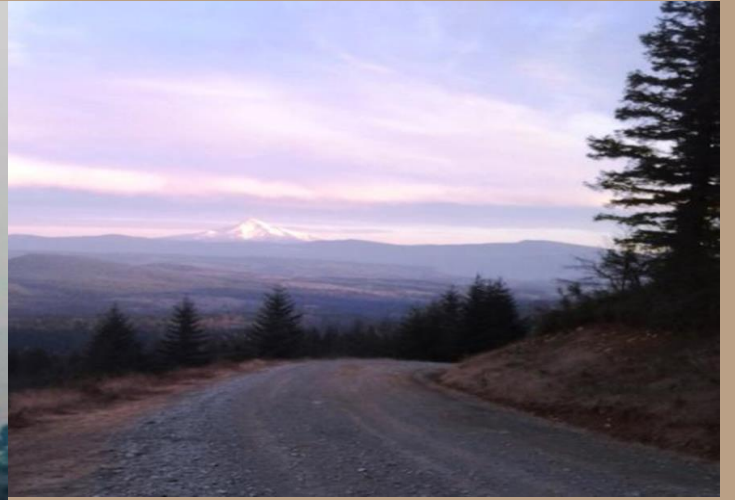


# Benefits of Salesforce for DNR

- Very Easy to Configure and Modify
- In-house Administrator
- Built in Reports and Dashboards
- Built in Integration to Your Desktop
- 3 Upgrades A Year
- Mobile – Access the Information From Anywhere, Anytime



# Diverse Landscapes



# Diverse Landscapes



# Diverse Landscapes





THANK YOU