

**opentext™**

**Success story**

**Red Deer County**

**Industry**

- Government

**Solutions**

- OpenText™ Content Suite
- OpenText™ Enterprise Connect
- OpenText™ Tempo™ Box
- OpenText™ Physical Objects

**Partner Support**

- Cadence Solutions

**Results**



**Eases access**  
and collaboration



**Meets user needs** for  
higher adoption



**Extends protected access**  
to external users



**Fulfills compliance and  
retention requirements** for  
digital and physical records

**Red Deer County**



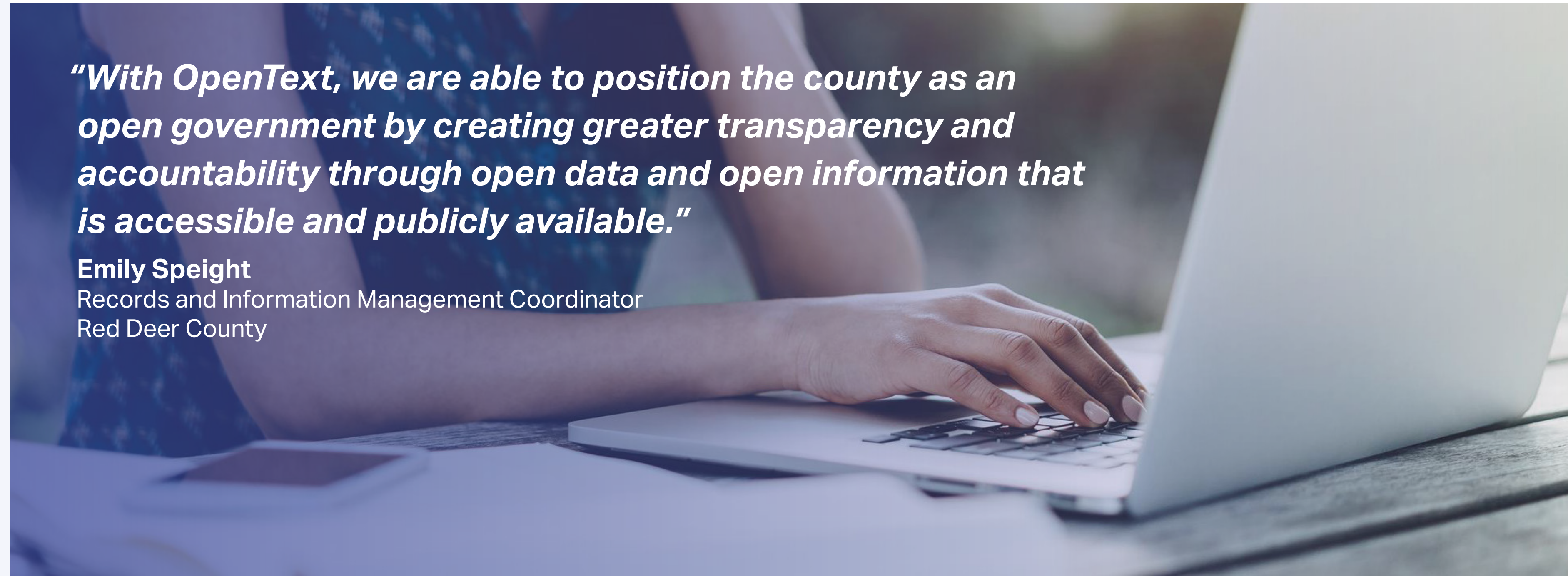
# Red Deer County establishes foundation for digital governance

**Alberta municipality integrates content management where employees 'live and breathe,' extends protected access through OpenText ECM technologies**

*"With OpenText, we are able to position the county as an open government by creating greater transparency and accountability through open data and open information that is accessible and publicly available."*

**Emily Speight**

Records and Information Management Coordinator  
Red Deer County





**Red Deer County needed easier access to historical and active files. It wanted a content management system that can grow with the municipality as it modernizes services. OpenText™ Content Suite offers the County an integrated ECM solution to build the foundation for its digital transformation.**

### **Complicated content management**

In the heart of central Alberta, Red Deer County combines country living with the convenience of city amenities. As the third largest municipality in the province, the County serves a population of close to 20,000 citizens.

For 100 County employees, managing information used to involve cumbersome, orphaned methods for document control. **"There really wasn't ownership of the shared drive or email management,"** explains Emily Speight, records and information management coordinator for Red Deer County.

While installed to scan files as digital records, the county's previous enterprise content management (ECM) system proved costly and difficult to use. **"People didn't realize how big a project it is to digitize,"** Speight says. **"You don't just drop (a document) in... and hit the green button."**

The system stayed limited to a repository for historical documents, with no connection to the business processes in place to keep the county running effectively. Though Speight worked to add active records, adoption rates remained low since users were unfamiliar with the system and it was a different environment than what they were used to working in. Additionally, it did not provide a way to manage physical records without a workaround.

**"When assessors are doing their site inspections, we get requests for a large number of files. The Records staff manually typed document and employee information into a Microsoft® Excel®**

**spreadsheet,"** Speight recalls. **"During the assessor's busy time, we had to devote a lot of staff time to circulation. It was really time consuming. The spreadsheet got so large... you'd go get a coffee before the thing would open."**

### **Surprise solutions**

Due to the challenges, demand for an electronic document and records management system at the County waned and digital transformation stalled. In fact, the County was not looking for an ECM system when a new door opened. **"We were looking strictly at systems that barcoded and managed our paper records,"** Speight says.

One of Speight's colleagues had recently left an organization that used OpenText ECM solutions. **"She was telling me how much she missed OpenText,"** Speight says. **"She was pining for it."** Speight and others were intrigued, then impressed upon seeing an OpenText demonstration. **"There are functionalities OpenText has that we love that we didn't realize we were missing before."**

### **Intuitive, integrated experience**

Based on OpenText reputation and capabilities, Red Deer County recognized the opportunity to move towards digital governance with efficiencies that support employee productivity and service to citizens. Employees can more effectively manage and share information. **"With OpenText, we are able to position the county as an open government by creating greater transparency and accountability through open data and open information that is accessible and publicly available,"** notes Speight.

Easy, secure access to information improves the way users create and consume information and work more productively.

**"Processing a box of files for storage could take half a day, now it is done in less than an hour... it's been good for productivity."**

**Emily Speight**

Records and Information  
Management Coordinator  
Red Deer County



***“There are certainly features in OpenText that make it a lot easier for our end users,”*** says Speight. ***“Unlike our previous ECM system, with Content Suite, categories are inherited down in the folder, ensuring consistent metadata for later access. Our Records staff were extremely excited about this feature because it saves us a significant amount of data entry, removes data entry burdens from our users and ensures more accurate searching.”***

### **Intuitive control**

Red Deer County introduced employees to the Smart Views user interface in Content Suite 16. Refined and customizable, the Smart UI allows county professionals to work within their roles while accessing the most recent documents and connecting with co-workers through embedded collaboration. With responsive design for mobile and desktop access, the Smart UI is also seamlessly extensible to other applications.

Most County employees use OpenText™ Enterprise Connect, an alternate desktop interface that enables them to interact with Content Suite directly from Microsoft® Office or other Microsoft applications. Enterprise Connect is ***“extremely helpful for user adoption,”*** according to Speight. ***“We have a diverse group of users. We’ve found that with desktop integration we’ve been able to satisfy all people and meet their needs.”***

Since all Red Deer County employees rely on Content Suite for document access, some users—and one in particular—appreciate the ability to send links rather than attachments for document sharing. ***“He has been very vocal about how much he loves this feature,”*** Speight says. ***“I wouldn’t dare send him a document attached to an email, because I’d be told, ‘Send me a link!’”*** As a manager, this user is a champion for the new system, which is beneficial for change management and user adoption.

### **External access**

Through OpenText™ Tempo™ Box, convenient, protected access to documents in Content Suite is extended to external contractors and others for a simple, secure way to share, file sync, access and manage information. For instance, the Safety Codes group assigns permit inspections to a third party. Construction plans and applications are saved in Content Suite and accessible to the contract inspection staff. Rather than forwarding the inspection documents to administrators to upload, the contract inspection staff can save the inspection documents directly to Content Suite in real-time via Tempo Box.

***“When we told them we can get your records into our system in real time, you do not need to be on the network, you just need an internet connection, that was well-received,”*** Speight notes.

County committee records are made available to members using Tempo Box. Chairpersons can then check an audit trail of who has reviewed the material.

Speight says Tempo Box is also useful for sharing large documents, such as files requested through the Freedom of Information and Protection of Privacy Act. ***“It has been very handy because in the past, we had issues when trying to send emails if the attachment was too big. We have government information... I don’t think it is good practice to send the files in Dropbox. Tempo Box provides us a secure, professional platform for sharing.”***

### **One-stop records management**

Overall, an integrated ECM system with robust search capabilities provides Red Deer County employees with reliable access to the documents they need, when they need them. ***“You just do one search and you get everything you need to make the appropriate decision,”***

***“Having a system like OpenText in place allows us to say with confidence that we did a thorough search and provided all the records without having to run from office to office.”***

**Emily Speight**

Records and Information  
Management Coordinator  
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Speight says. For meeting compliance guidelines, ***“having a system like OpenText in place allows us to say with confidence that we did a thorough search and provided all the records without having to run from office to office.”***

To fulfill retention requirements, county employees previously entered—by hand—the contents of file boxes into a database. Now, Red Deer County takes advantage of the OpenText™ Physical Objects module, which supports barcode label, warehouse and circulation management. Thus far, the County has processed close to 700 boxes in its on-site storage. ***“It’s a beautiful thing,”*** Speight says. ***“Processing a box could take half a day, now it is done in less than an hour... it’s been good for productivity.”***

## Securing an ECM foundation

Red Deer County worked with OpenText partner, Cadence Solutions, to implement the integrated system. As an organizational initiative, an ECM strategy benefits from establishing policies and procedures and working with providers that are trained and competent, according to Speight. Focused efforts then foster senior management support, a must-have for change management. ***“Having the right consultant made all the difference for us,”*** she notes.

Now that the County stands on a solid ECM foundation, it looks forward to adding other OpenText technologies for supporting digital governance. OpenText™ Email Management for Microsoft® Exchange is next, then on

to OpenText™ Capture Center for classifying and extracting data from municipal forms. Speight and her team are also evaluating OpenText™ Brava!™, which enables users to manage any file, on any device within business rules. Document management via workflows will increase as county employees recognize the power of process automation. ***“We have an HR professional who is forward-thinking and who is screaming for workflow,”*** Speight notes. ***“She has 101 different ways we can use it.”***

Unlike other ECM systems Speight investigated, OpenText offers the capability and capacity to support Red Deer County at all points along its path to an information governance program. ***“We can add capabilities down the road,”*** she says. ***“We’re not going to outgrow the system.”***

## About Cadence Solutions

Cadence Solutions works exclusively as an OpenText Partner implementing Content Suite. Cadence has guided organizations all the way from business case development through to the implementation of the solution. Cadence’s industry-leading expertise has been built through multiple engagements with the Energy, Utility, Engineering, Membership, Technology, Not for Profit, Pharmaceutical and Public Sector industries.

[cadencesolutions.ca](http://cadencesolutions.ca)



## About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](http://opentext.com).

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