



Success story

The City of Calgary

Industry

- Government

Solutions

- OpenText™ Content Suite Platform
- OpenText™ Records Management



The City of Calgary streamlines content access and compliance

Large administration meets variety of business needs with OpenText flexibility and integration

Results



Streamlined, built-in access and compliance



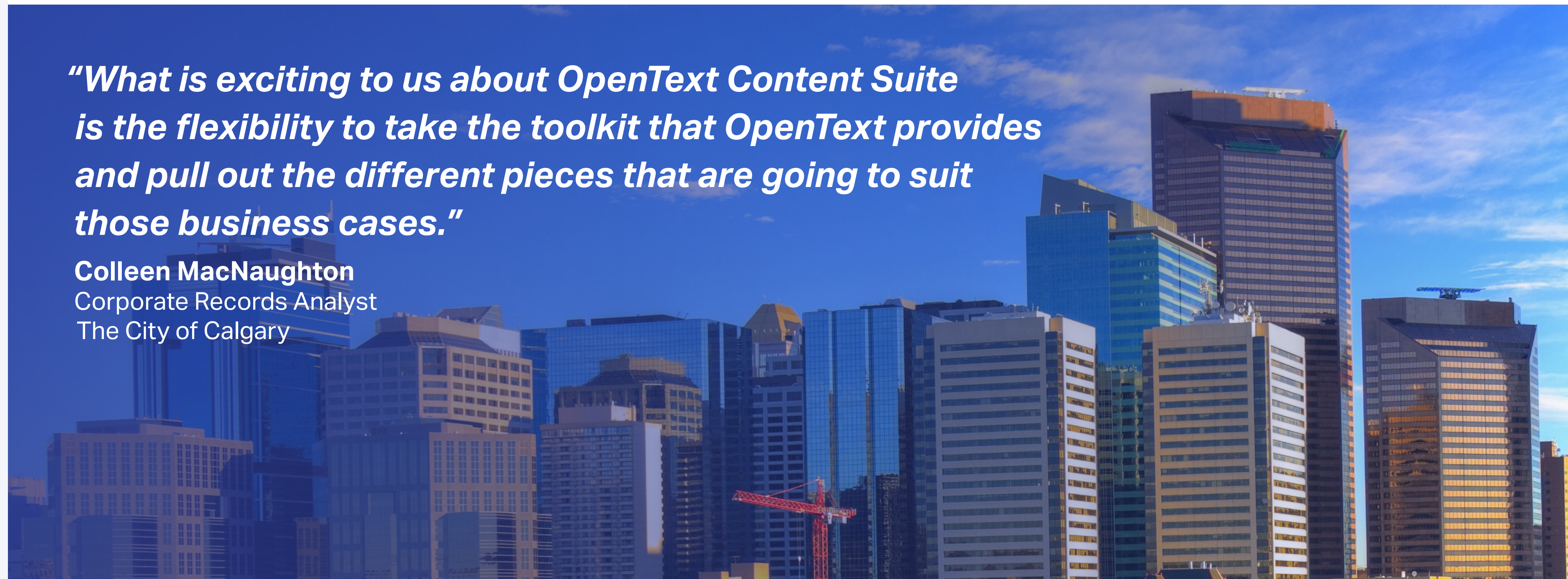
Increased accountability



Retained the **information of value**

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Colleen MacNaughton
Corporate Records Analyst
The City of Calgary





The City of Calgary streamlines content access and compliance

Situated east of the Canadian Rockies with a population of more than 1.1 million, Calgary is the largest city in Alberta and the third largest municipality in Canada. The City of Calgary employs 15,000 and provides a variety of citizen services. As such, the organization needed a flexible enterprise solution to securely capture and manage content and documents—and found it in OpenText™ Content Suite Platform.

City of energy

Calgary and its surrounding region are home to the third largest oil reserves in the world and has become a tourism hotspot. Support for more than a million residents is spread across several departments. Serving a vibrant, growing city requires many groups to work together and share an abundance of content within the organization and with residents.

OpenText™ Content Server and OpenText™ Records Management enable The City of Calgary employees to easily access, manage and store content while maintaining compliance and security. Accessibility and compliance are the perfect pairing, according to Colleen MacNaughton, corporate records analyst for The City of Calgary, especially when they are matched with a solution that answers needs with automatic control. ***“How do users need to access information so that they don’t realize they are complying while they are doing it?”*** MacNaughton asked, outlining an ideal model for information management. ***“Really, ECM is about supporting people and anticipating their needs.”***

Business flexibility

“One of the things that is interesting about The City of Calgary is we have so many different lines of business,” said MacNaughton, whose corporate records team is situated in the City Clerk’s Office. ***“So, when we look at how OpenText Content Suite is being used, we have got really quite a range of applications.”***

Initially, The City of Calgary implemented Content Server to ensure complete documentation for property taxes, including valuation, appeals and tax payment processes. Then, managers expanded the system to enable online permit applications and facilitate workflows within finance and other areas. Content Server also feeds The City website for documents and reports within the City Council collection. ***“Citizens can come to our public website and type in a query based on a concern they may have, for example, about cat licenses or their neighbor’s RV, and they are able to look up either the by-laws or to find a Council decision about the requirements or a new initiative that we might be doing,”*** MacNaughton said.

With Content Suite, employees also have quick access to city-related data. Users within the Geographic Information System (GIS) application at The City of Calgary can obtain information by clicking on an asset, from signs and street lights to water and sewer infrastructure, land databases and more.

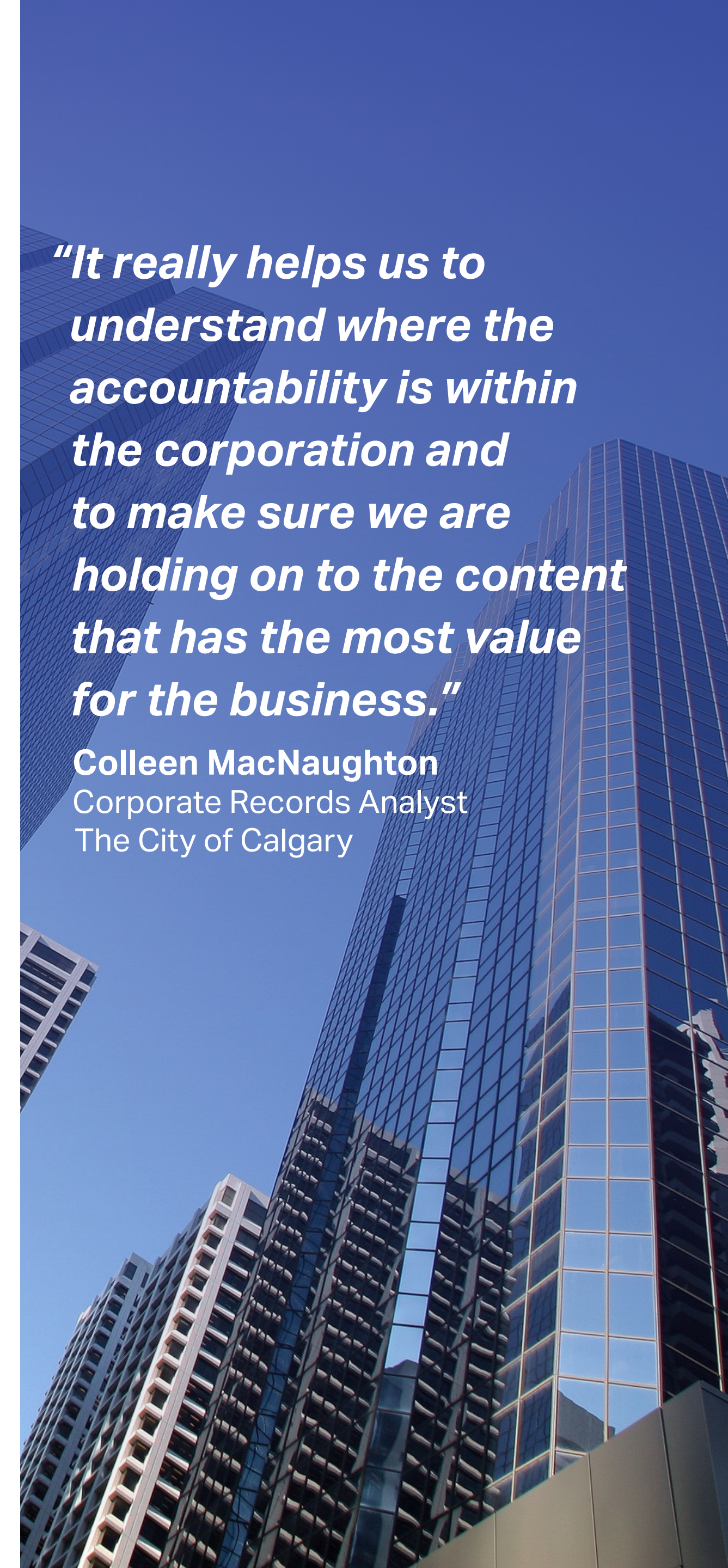
MacNaughton enjoys talking to additional business units when they are looking for areas to update with ECM: ***“What is exciting to us about OpenText Content Suite is the flexibility to take the toolkit that OpenText provides and pull out the different pieces that are going to suit those business cases.”***

Content management

The Content Suite Platform used by The City of Calgary is a comprehensive Enterprise Content Management (ECM) system designed to manage the flow of information from capture through maintenance, disposition or transfer to the Archives. Using ECM solutions from OpenText, The City of Calgary supports and anticipates needs of its constituents while meeting the productivity demands of employees and the regulatory requirements of its industry.

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Almost half the business units within The City of Calgary—several thousand users—maintain a presence within Content Server, and it's growing. What started as a way to manage documents is expanding as The City upgrades and adds functionality. ***"Document management is just one pillar for (OpenText),"*** MacNaughton said. ***"There are so many other pieces OpenText is adding for the whole enterprise."***

Other organizations could learn from how The City of Calgary is using Content Suite, particularly as it relates to information governance. First, Content Suite helps The City capture content it can actually track, according to MacNaughton. ***"It is really difficult to understand who is responsible and the value for the content that is still on network drives and in email accounts,"*** she said. Once a workspace is established in Content Server, the system automatically assigns responsibility, record type and retention requirements to documents as they are added. It eliminates chasing document owners for data: ***"They don't remember anymore,"*** MacNaughton said. ***"They are on to the next project, the new challenge to them in their business environment...users don't have to be records managers."***

Content created by one workgroup is easy to access by other workgroups through Content Suite. ***"We can help tie that together for them,"*** MacNaughton said, with transparency and seamless integration. ***"It really helps us to understand where the accountability is within the corporation and to make sure we are holding on to the content that has the most value for the business."***

Records management

The City of Calgary established a strong records management program that supports groups with different needs. For the legal department and Freedom of Information Group, control and governance is top priority. For the Security team and for City Council, it is paramount that the

separation between public documents and confidential content be maintained. However, business units with field services staff are looking for an easy way to get the information they need. ***"Users in the field are fixing things and want it to be easy to click a button in an application and have it go wherever it is supposed to go...Content Suite meets the needs of end-to-end, both audiences that you have,"*** MacNaughton said.

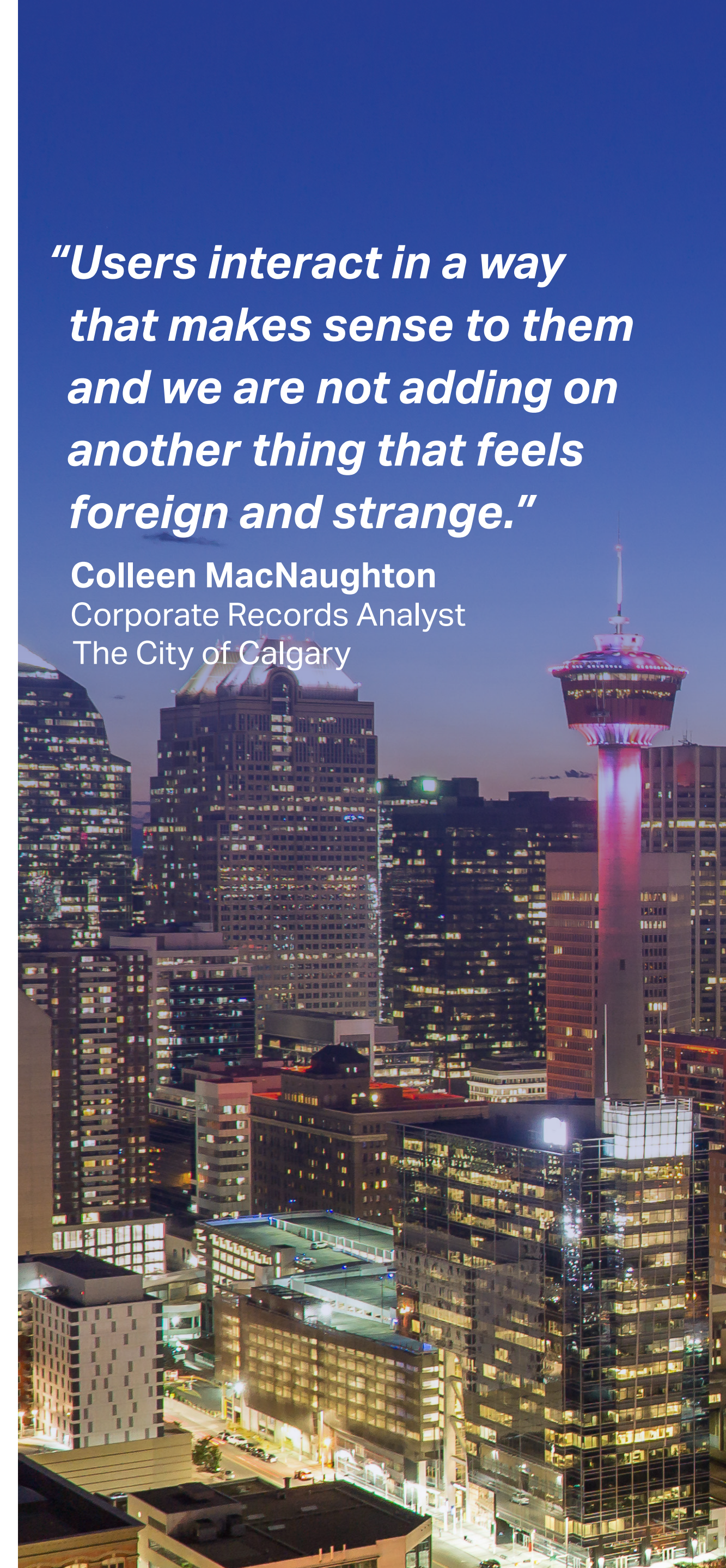
OpenText flexibility is related, in part, to its transparency. For instance, folders are designed so classification information is visible to all users, but assigned by records specialists within each business unit. These specialists confirm the right classification codes, update status values and confirm record dates for imported content. After that, all records added to a folder inherit the necessary classification and retention information. ***"A records tab is visible to users if they are interested, but they never have to go there,"*** MacNaughton mentions. ***"It's great to work within the context we have within each business unit,"*** whether it involves integration with third-party products or other functions. ***"Users interact in a way that makes sense to them and we are not adding on another thing that feels foreign and strange."***

Upgrade additions

Among other features, enhanced disposition capabilities influenced The City to upgrade to Content Suite Platform 10. ***"Even though we had a retention schedule...it was really hard to get approval from folks if the content was sitting inside of other repositories,"*** MacNaughton said. Now, records management metadata is available to support disposition decisions. ***"We will have the audit trail to show why we made that decision consistent with our policy and that is much more defensible than having a policy that we are not actually implementing."***

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Visibility, notification and comment tracking within Records Management will ease monitoring and simplify interaction for employees and clients, according to MacNaughton. ***“It’s going to streamline processes and make it easier for users,”*** she said. ***“There is less of a focus on a form with the signature and more of a focus on what they can access from email and their own notifications. I think we are expecting to see people act on those requests for approval much more quickly than they would have without these features.”***

Users are enthusiastic about other features within Content Suite including thumbnails and workflow. MacNaughton said, ***“We have more graphic material coming into Content Server and the fact that they will be able to see that information and confirm it is really exciting. We also have more folks wanting to have workflows integrated with their documents.”***

Future plans

To date, The City of Calgary implemented OpenText solutions to address specific business requirements within specific groups. ***“What we want to do better as we move to Content Suite Platform 10 is to really be on an enterprise scale,”*** MacNaughton said. The City is now making changes in the information architecture, the hardware architecture and increasing coordination between Records Management, Information Management and IT. ***“We are excited about getting there. It is going to bring some new things for us at the City.”***



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.

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