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Hummingbird Enterprise™ in
Financial Services

CGA Ontario Put an End to Information Overload

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— Boyd Dyer, Manager of Web Technology

The Certified General Accountants of Ontario (CGA Ontario), a self-governing association of professional accountants in this province, represents approximately 13,000 certified general accountants and close to 9,000 students in the CGA program of professional studies.

Due to the large number of members, not to mention their wide geographical distribution, CGA Ontario increasingly felt the need for a modern, timely, and cost-effective method to categorize and disseminate its information and services.

Recognizing the potential of the Internet CGA Ontario launched its inaugural Website in January 1996. Originally intended to represent the association to the public and serve as a marketing tool, the Web pages were restricted to current information and documents that previously had been approved for public distribution. As more people “went online,” CGA Ontario’s Website quickly became one of the association’s most effective communication tools between administrative staff, board of governors, CGAs, and students. The Website soon expanded its offerings to include the latest breaking news, JobFind, direct access to CGA Ontario’s databases, course registration and information, course material and documentation, as well as a number of discussion forums and interactive elements.

Dealing with Information Overload

Gaining popularity among the membership because of its increasing usefulness, the site continued to evolve at a tremendous rate. Growing to well over 600 pages, with an average of more than 55,000 hits per month, finding specific information (i.e., content) soon became an issue. Visitors to the site looking for information often would have to scroll through countless pages before finding what they wanted. The result was that the CGA Ontario call center was soon overloaded with requests for help in finding information.

To help remedy this “information overload” situation, CGA Ontario began researching potential search engine/content management solutions to help its users locate the required information quickly and easily.

Following a review of several vendors with the criteria of product functionality and ongoing company support and stability, CGA Ontario chose Hummingbird Enterprise™ KM to provide the necessary search engine tool and knowledge management solution for the effective management of its Website and documents. For CGA Ontario, Hummingbird provided the most functional and customizable solution that could be tailored to the association’s needs. Additionally, Hummingbird offered the strongest support structure and the most stable corporate environment.

“Our call center is always overburdened. Using Hummingbird Enterprise KM for search and retrieval has reduced that burden and made it more manageable,” says Boyd Dyer, Manager of Web Technology at CGA Ontario.

Hummingbird Enterprise KM is an integrated software suite that dramatically improves the way organizations manage information sources. Users can conduct single, unified searches across multiple information sources, no matter where the information is stored. Results are then grouped by similar theme or concept, making it easier for users to find the right information. Hummingbird Enterprise KM item-viewing technology supports more than 200 office item formats, including Adobe® Acrobat® PDF, HTML, Lotus Notes™ database notes, and Microsoft® Exchange messages.

Business Profile

Industry

Accounting

Organization

Certified General Accountants of Ontario

The Challenge

- > CGA Ontario needed to implement an effective software tool, which would allow its users to intelligently search for and retrieve available information on the association’s fast-growing Website

Hummingbird Solution

- > Hummingbird Enterprise™ KM

Key Benefits

- > Fast, intelligent searches and retrievals
- > Ability to view information in native format
- > Ability to organize information according to the user
- > Compatible with a number of platforms, including Windows NT® 4.0 and Windows® 2000

A number of specific features, which went beyond CGA Ontario's original criteria, helped to make the final decision to install Hummingbird Enterprise KM.

- > Quick search capabilities that are rationally displayed to the user
- > Varied options for how the search information is displayed
- > Platform neutral software and a relatively easy graphical user interface

Key CGA Ontario staff met with Hummingbird representatives and the integration team to discuss hardware and software requirements, integration location, and a timeframe for set up. CGA Ontario's internal staff and resources would conduct maintenance and support, making use of help from Hummingbird representatives as required.

Testing the Solution

After implementation, CGA Ontario conducted a number of tests before the rollout. The software was checked to see if it was stable with CGA Ontario's Windows® NT 4.0 operating system. Connectivity to the database was then tested to ensure the successful passing of information. The software was also configured so that it would properly "crawl" CGA Ontario's Website, as well as update itself whenever the site was modified.

One final test was conducted before the engine went live: the search engine was checked for any gaps where it appeared certain pages were missing.

With Hummingbird Enterprise KM now in place, users can rapidly retrieve summarized results in a variety of meaningful formats, allowing them to quickly sort through (and assess usefulness of) available information on any given topic.

At last count, the search engine was being accessed upwards of 3,000 times per day. With the ability to support 250 simultaneous searches at any given time, the search engine has met CGA Ontario's expectations. It has been of great use to external visitors (i.e. members of the public), as well as internal users (CGAs, students, and staff) who use the association's Website as a valued information resource.