

> Customer Success Story

Region of York Migrates to Hummingbird Enterprise™ for Improved Business Processes

“Hummingbird Enterprise™ DM allows for faster searches, saves us money, and reduces risk. It’s a great business continuity mechanism and it helps us to comply with the legislation. It’s also very user friendly so staff can manage their e-mail and documents very easily.” — Denis Kelly, Regional Clerk, Regional Municipality of York

Business Profile

Industry

Municipal Government

Organization

Regional Municipality of York

The Challenge

- > Transition to latest version of the Hummingbird document management system
- > The Region required no disruption of service to staff
- > Transition had to take place over the course of one weekend

The Solution

- > Hummingbird Enterprise™ DM deployed in conjunction with Hummingbird Professional Services

Key Benefits

- > Improved business processes across the organization
- > Significant reduction in amount of time spent on document related activities, including search and retrieval, check-in/check-out, versioning, and applying appropriate security controls
- > Zero disruption during migration to new version
- > Hummingbird Professional Services ensured smooth transition and customer benefits from effective post-migration support

The Regional Municipality of York is located just north of the city of Toronto, Ontario. Comprised of 9 municipalities, it has a population of close to 900,000 and some 25,000 businesses within its borders employ 395,000 workers. Its 2,300 full time staff oversee a budget of \$1.7 billion per year and provide services for residents and businesses ranging from transit and social services to regional planning and growth management.

York Region began to look for an electronic document management system (EDMS) in 2001, realizing quite early that an EDMS would be a key tool to help it address several operational challenges as well as meet its obligations under new regulations established by the Municipal Freedom of Information and Protection of Privacy Act. In late 2002, the Region implemented an EDMS, termed eDOCS, based on an earlier document management system from Hummingbird.

“We were able to visit some other government sites with an EDMS in place including the Ministry of Indian and Northern Affairs. Hummingbird’s document management system stood out as an effective, easy to use solution,” says Denis Kelly, Regional Clerk, Region of York. “We selected Hummingbird technology primarily for the broad range of functionality and its competitive cost. Their solution met the functional requirements that were part of our RFP.”

York Region wanted a solution that would help improve business processes in general. Firstly, the Region wanted to bridge the information silos across regional departments and locations. Secondly, the Region recognized that a substantial shift from paper to electronic records was taking place and needed a solution that could handle the wide range of document types being created. Fast searches were another consideration. Finally, the solution had to be cost competitive.

The pilot and initial implementation of eDOCS realized some significant benefits for the Region, automating its paper-based system and enabling the staff to better manage and access electronic content and address legislative pressures. In 2004, the Region undertook a study to review the current implementation and determine areas for improvement and opportunities for additional value.

Migrating to Hummingbird Enterprise DM

In mid-2004, the Region was ready to make the move from its current Hummingbird document management solution to Hummingbird Enterprise DM.

“We decided to move to Hummingbird Enterprise because the technology platform is a better solution for the environment here and the new functionality proves very useful in our organization,” says Martin Shao, eDOCS Project Manager. “The public and private folder work spaces are great features.”

“It offers easier sharing and more control over documents,” adds Kelly. “Users have more control over individual documents and can also share groups of linked documents with people in other departments,” he says.

Shao also reports that the Web administration tool in the new version makes it easier for his admin staff to manage the system remotely.

The initial pilot based on the earlier document management system, with 53 users in 2002 has since expanded to 350 people using Hummingbird Enterprise in all departments of the Region. By the end of 2005 the Region expects to have 600 users on the eDOCS system. Over 80,000 electronic documents are already in eDOCS with some 150-200 added daily. Kelly points out that there are close to 90,000 individual activities per month on the system. The total documents include all Council and Committee records going back to 1971 when the Region of York was first established.

EDMS as a Business Process Support Solution

The Region has based its use of Hummingbird Enterprise on business processes rather than on departmental requirements. "We have a strategy to expand it through business units as processes instead of individual departments so we have eDOCS users across all the departments focusing on key processes," says Shao.

This allows the Region to break down informational barriers between different departments and creates greater efficiencies in both organizational processes and document handling. For example in the budget process, all departments can now work from one spreadsheet stored in the Hummingbird Enterprise DM repository rather than submit separate documents as in the past. This reduces the time it takes to finalize a budget and removes a lot of the complexity for the people charged with harmonizing each department's needs.

"There was a problem with version control in the past before we implemented eDOCS. Each individual department submitted their own budget documents to the finance department. It became a bit of a nightmare to manage them all, compiling all the individual departments' documents to one consistent budget book was a big challenge," says Shao.

The Council and Committee process is another key area where eDOCS is used extensively. Some 110 Council and Committee meetings take place each year, with an average of 600 staff reports going through those meetings. eDOCS makes it much easier for everyone to be on the same page when arriving at decision points. Other processes where eDOCS is used include project management, reviews of legal agreements, construction projects, land use approvals, meeting agendas and notices, facility management, research and precedents, and even performance reviews.

Hummingbird PSO Teams up with York Region

To effect a smooth transition to Hummingbird Enterprise DM, York Region engaged Hummingbird Professional Services to assist in the migration. The Region had one strict requirement: Zero disruption to users. This meant that the migration would have to be done over the course of the weekend, going live the following Monday.

Shao and Paul Gravel, Project Manager, Hummingbird Professional Services, both agree that the keys to a successful migration are planning and a thorough understanding of the environment. "We needed a bullet proof strategy so we could be confident that the migration could be completed in one weekend and go live on Monday. Everything had to work the first time around," says Shao.

"The migration went quite smoothly. We thoroughly planned it out with Hummingbird consultants. Any issues that came up in the process, Hummingbird was quick to come up with solutions," says Shao. "You really have to understand your existing environment, you have to understand how the new architecture will look, and you have to understand how you are going to convert things," he adds.

Another important consideration when upgrading is to validate the upgrade against a model of the production environment. "You need to flush out all the issues ahead of time," says Gravel. "We defined an in depth, step-by-step plan that documented everything. Then we duplicated York's production environment in a test environment and validated the upgrade against it." Results were analyzed and the migration plan was modified to ensure that the upgrade was completed successfully. For example, the Region was upgrading its database at the same time as the migration, so tests had to be performed to make sure that no surprises were introduced into the process as a result.

Don't Forget the Users

Gravel points out that it is very important to take into consideration how people use Hummingbird Enterprise DM before embarking on an upgrade. "You need to have a transition plan for users. You've got to look at how they use the system and devise a plan to migrate them to the new software," says Gravel. Questions such as when to turn on new features, and how to provide training to users should be answered before the migration.

"You have to understand how staff do their work and where the new features are going to add benefit to them," says Gravel. And you have to remember that transitioning users is often as much of a selling process as it is a training process. "When Hummingbird PSO is involved with transitioning a customer to Hummingbird Enterprise, they benefit from more effective post-migration support," he adds.



Corporate Headquarters

1 Sparks Avenue, Toronto, Ontario M2H 2W1 Canada
Toll Free Canada/USA: 1 877 FLY HUMM (359 4866)
Tel: +1 416 496 2200
Fax: +1 416 496 2207
E-mail: getinfo@hummingbird.com

For more information, visit www.hummingbird.com/us/roy

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