



Canada

Government Agency Streamlines Information Management and Enhances Collaboration

Overview

Country or Region: Canada

Industry: Government

Customer Profile

Parks Canada Agency is a government agency mandated to preserve and promote Canada's national parks, historic sites, and marine conservation areas.

Business Situation

Parks Canada's challenge—managing an increasing volume of information across a decentralized organization—is one that plays a central role in Parks Canada's programs.

Solution

To streamline information and records management, Parks Canada chose an enterprise content management, collaboration and information rights management solution based on the 2007 Microsoft® Office system.

Benefits

- Decreased information and data management costs
- Enhanced experience for visitors
- Improved collaboration with partners and customers

“The improved information management tool will enable us to better protect our assets, service our internal and external customers, and enhance community building for our employees.”

Dany Beaumont, Senior Project Manager of the Chief Information Officer Portfolio, Parks Canada Agency

Parks Canada Agency's mandate is to protect and represent Canada's natural and cultural heritage and meet the challenges of resource protection and ecological, commemorative, and management integrity. The national headquarters, which is located in Gatineau, Quebec, provides services to centers and field units spread across all of Canada. Creating, managing, and distributing the information and records, including pictures, reports, and requests for information generated by approximately 6,000 employees, is a challenge. To facilitate the management of information, improve integration with back-office systems, reduce costs, and improve community-building among dispersed employees, Parks Canada chose to implement the 2007 Microsoft® Office system with its XML capabilities.



Situation

With 41 national parks, 153 national historic sites, and 3 national marine conservation areas, Parks Canada Agency has a wide-ranging mandate related to preservation and promotion. The employees at the headquarters in Gatineau, Quebec, have to collaborate with service centers and field units spread across Canada— from coast to coast, covering 13 provinces and territories.

Parks Canada offers a premier standard of service to its visitors. It also provides high-quality consultation to stakeholders and researchers from academia, as well as administrative services that enable the management of the sites across Canada.

Numbering 26 million visitors each year, the people who visit Canada's national parks and historic sites are a diverse group, from Canadian citizens and tourists to business customers (leaseholders), and people participating in youth engagement and educational initiatives.

Business Priorities

Parks Canada makes every effort to anticipate and meet visitor needs while ensuring the protection of heritage assets. To achieve this, Parks Canada has identified specific business priorities that include:

- Establishing and protecting natural and cultural heritage.
- Building public support.
- Enhancing visitor experience and education.
- Connecting with people visiting for the first time.
- Improving asset management.

Parks Canada addresses these business priorities by conducting specific programs designed to meet the challenges of resource protection, and ecological, commemorative, and management integrity. Information management and technology play a central role in supporting the development and growth of Parks Canada's programs. Therefore, it became vital that Parks Canada improve its information and records management process.

Challenges in the Information and Records Management Process

Parks Canada experienced two primary challenges in the information and records management process:

- Difficulty managing electronic records (volumes and formats)
- Increased need for access to information and systems by geographically dispersed employees with limited connectivity

Figure 1. The information and records management process



“We must ensure that the information generated by Parks Canada is adequately protected, preserved, and used.”

Dany Beaumont, Senior Project Manager of the CIO Portfolio, Parks Canada Agency

“We must ensure that the information generated by Parks Canada is adequately protected, preserved, and used,” explains Dany Beaumont, Senior Project Manager of the Chief Information Officer Portfolio (portfolio of IT projects) at Parks Canada Agency.

See Figure 1 on the previous page for a detailed breakdown of the information and records management process.

Parks Canada is organized around several departments, including Corporate Services, National Parks, Historic Sites, Marine Conservation, Relation to Visitors, and Operations. There are 36 field units organized by geographic areas, which are managed by approximately 15 directors. Some 6,000 employees (including 2,000 seasonal employees) contribute to the generation of information that must be managed. This information comes in multiple forms, such as pictures, instruction guides, brochures, and reports in many different file formats, which results in compatibility and accessibility issues. Parks Canada experienced difficulties managing the electronic records produced every day by its employees.

Since Parks Canada is a government agency, some information produced, such as data or documents on public outsourcing or purchasing contracts, must be safeguarded, and distribution must be managed. However, the tools and processes to help safeguard information and data are not yet optimal.

On the other hand, the Parks Canada agency is also required by Canadian laws to provide information to the public when requested. This is called an “access to information request,” and it can be made by any Canadian citizen. Since multiple “access for information requests” are addressed to Parks Canada each year, the agency must possess

the tools and processes to react and respond in a timely and cost-efficient manner.

Given this situation, “the need for users to be able to access information and systems from almost anywhere inside or outside of the Parks Canada network is increasing,” explains Beaumont.

Because Parks Canada operates within such a geographically dispersed environment, some units are isolated. Employees also face the challenge of limited connectivity. Parks Canada needs to distribute up-to-date information to all its employees to ensure the successful operation of the national parks. Yet, the agency does not have an efficient way of distributing information to the employees or ensuring collaboration on reports or documents creation.

For example, within the IT department, employees often have to submit documents to third-party resources. These documents are used when the agency wishes to use the services of an external contractor or vendor, and they describe the specifications and details of the work or service to be performed by the vendor. Usually, several employees from various units are involved in the creation of such a document, and the collaboration among these participants is not always optimal.

Critical Success Factors for the Information and Records Management Process

To ensure optimal management of information and records, Parks Canada’s Chief Information Officer identified several critical success factors and associated key performance indicators (KPIs):

- The ability to find the right information at the right time (KPI: resources saved in searching for documents, resources spent

Figure 2. Breakdown of improvements and benefits for each step of the information and records management process

- working on access to information requests).
- Better collaboration to develop data and documents (KPI: time spent on collaborating on a strategic submission to third-party source, time spent coordinating and organizing group work).
- The safeguarding and preservation of key information (KPI: resources to create a safeguarded area for a group of documents, time to categorize and apply security-level access to a document).

The identification of the critical success factors for the information and records management process helped Parks Canada recognize a number of areas of improvement.

Solution

In order to be more efficient in finding, collaborating on, and safeguarding important information, Parks Canada adopted a solution to streamline the information and records management process. Parks Canada is deploying Microsoft® Office SharePoint® Server 2007 and Microsoft Office Professional Plus 2007, with a focus on Microsoft Office Word 2007, Microsoft Office Excel® 2007 spreadsheet software, the Microsoft Office PowerPoint® 2007

presentation graphics program, and the Microsoft Office Outlook® 2007 messaging and collaboration client.

See Figure 2 for a description of the improvements and benefits in the Information and records management process (as detailed in the Process Level 2 of Figure 1).

Using Business Strategies and Tools to Enhance Information and Records Management

By working with the newest productivity tools from the 2007 Office release, Parks Canada will be able to streamline the information and records management process with document libraries and collaborative tools.

Facilitated Information Creation, Storage, and Sharing

In order to facilitate information creation and enable employees to better respond to information requests, Parks Canada will use the new features of Office Word 2007, Office PowerPoint 2007, and Office SharePoint 2007.

Office PowerPoint 2007 and Office Word 2007 will help enable Parks Canada

Step	Activity	Current Process	Business Process Improvement	Benefit
1	Collect and find data	Employees have to look for data manually across many different systems.	Employees can find information quickly, and the categorization and easy navigation in the document repositories ensure that the information is correct.	Decreased time to look for information and improved time to respond to customer requests.
2	Create information or reports	Employees work remotely from various geographic areas, often offline, and have difficulties when they have to collaborate to create documents.	Employees can easily collaborate through workspaces, create professional documents based on templates, and reuse existing data to produce reports faster.	Accelerated document creation and improved collaboration across units.
3	Protect and store information	Information is stored in various places and confidential documents are not well protected.	Employees can implement access controls and Information Rights Management, and can use digital signatures. Information is stored in a centralized location and is available for English and French speaking audiences.	Increased data security and enhanced document and records availability.

information workers to create professional-looking documents with greater ease. Parks Canada employees will conveniently create SmartArt™ graphics (diagrams) based on bulleted lists. Employees will be able to reuse existing content from one presentation in another with PowerPoint Slide Libraries. With the streamlined user interface, they will be able to manipulate and work with text, tables, charts, and other presentation elements in richer ways and with just a few clicks.

Using the Quick Styles and Document Themes features in Office Word 2007 will help Parks Canada users easily format their documents by quickly changing the appearance of text, tables, and graphics throughout the entire document to match existing templates or comply with the agency's requirements.

When working on "access to information requests," the Building Blocks feature in Office Word 2007 will enable Parks Canada employees to quickly assemble documents from frequently used content such as disclaimer text, cover pages, or content already used in previous requests. This will improve responsiveness to information requests as well as consistency across documents.

Finally, the approval stage of the document creation process will be enhanced through the built-in workflow services offered in Office SharePoint Server 2007. Authors of documents that need to be reviewed by multiple approvers will initiate and track review and approval steps from within Office Word 2007 or Office PowerPoint 2007 and will be able to accelerate review cycles.

Office SharePoint Server 2007 will allow Parks Canada to store information in a centralized location. The Managed Document Repositories will provide a consistent mechanism to organize, categorize, navigate,

and search within a large number of documents. For example, Parks Canada will be able to store high-resolution photo images in a centralized location and both its employees and its visitors will be able to search these images.

Finally, sharing content with a bilingual audience will no longer be an issue, thanks to the Translation Library site template, which better supports translation of documents into French and English.

Community-Building Across Parks Canada's Multiple Sites and Units

Office SharePoint Server 2007 sites and team sites will facilitate community-building across Parks Canada's employees, who are working remotely from various geographic areas or offline. Geographical and functional community-based sites, built on the same environment and showcasing community-specific information, will allow all Parks Canada employees to reach the same community information. Through team sites and contextual workspaces, project teams will be able to collaborate and share information even when they are away from the office or offline.

Parks Canada workers will be able to use Office SharePoint Server 2007 for Search, which provides a single, integrated location to find people needed for a specific "access to information request" or report creation.

Finally, Office Word 2007 and Office Excel 2007 will facilitate community-building with features that enable integration with back-end systems and use new Ecma Office Open XML formats to facilitate collaborative work on up-to-date information. The interoperability of Open XML formats will allow Parks Canada employees to share information with many different applications.

Figure 3. Expected impact of the key performance indicators for the information and records management process

Document Security and Integrity

The 2007 Microsoft Office system-based solution will help improve document security and integrity by enabling access controls, a classification system, and Information Rights Management. Default security for safeguarded Parks Canada information will be based on user profiles generated from the Active Directory® service groups and document classification. Users will have the ability to increase document security based on the sensitivity of the information contained and provide access to a selected set of reviewers or readers depending on the group or management level to which they belong.

Office Word 2007, Office PowerPoint 2007, and Office Outlook 2007 support Information Rights Management features to help safeguard information in documents and e-mail messages.

Microsoft Office Professional Plus 2007 also offers the Document Inspector functionality to detect and remove unwanted comments, hidden text, or personally identifiable information to help ensure that sensitive information does not escape when documents such as responses to “access to information requests” are sent to the public.

In addition to these functionalities, Parks Canada employees will also benefit from the digital signature in PowerPoint presentations,

Excel spreadsheets, or Word documents to help ensure their contents are not changed after they send the document to another content producer or reviewer.

Finally, Office SharePoint Server 2007 also improves document security with features that help define document management and compliance policies through access rights at a per-item level. These features define how to track usage of content and identify what happens during a litigation that might involve that document. Office SharePoint Server 2007 also allows expiration policy definition and retention policies that determine how long a document should “live” and how to handle it at the end of its lifecycle.

Benefits

Through the implementation of the 2007 Microsoft Office system, Parks Canada expects to achieve several important benefits in the information and document management process. (See Figure 3 for detailed information on the key performance indicators for the information and records management process.)

Accelerated Response to Requests for Information

Due to increased capabilities provided by the 2007 Microsoft Office system, employees are able to spend less time looking for the right data and more time creating value-added information. To comply with government

Key Performance Indicator	Type of KPI Impact
Resources saved in searching for documents	Decreased costs
Resources spent on access to Information requests	Increased customer satisfaction and improved compliance
Time spent on creating a strategic submission to third-party source	Decreased costs
Time spent coordinating and organizing group work	Decreased costs
Resources to create a safeguarded area for a group of documents	Decreased costs
Time to categorize and apply a high security level to a document	Improved compliance

regulations, employees also have to respond to “access to information requests” coming from any Canadian citizen asking for information related to Parks Canada. Employees will be able to store those requests and easily reuse the responses when needed, thereby having more time to work on other activities.

Improved Efficiency on Document Creation

The IT teams should save time and costs when collaborating on a submission to a third-party source. With the solution, they will be able to share information and content through a workspace and accelerate the review process with workflows. The user-friendly solution will help to minimize both training and user support costs.

The solution will also improve collaboration with partners and customers and ensure a better mechanism for face-to-face consultation and feedback integration. The implementation of the 2007 Microsoft Office system-based solution should also contribute to decreased expenditures when creating additional direct services for customers, such as online discussion forums, as it seeks to enhance the experience of Parks Canada visitors.

Improved Information and Data Protection

The time needed to create a workspace for employees to collaborate should significantly decrease, and they can apply—almost instantaneously—a high-security access level to a confidential document. While working on a report, only the involved employees will have access to protected information.

In addition, the tools to store, organize, and search information and records across Parks Canada will ensure full protection of the agency's digital assets.

By managing information and records in a more efficient manner, Parks Canada Agency will be able to access and distribute information to all employees, no matter how geographically dispersed they are or remotely they work. This enables employees to focus their efforts on improving and maintaining the quality of the national parks and historic sites, as well as serving its customers to ensure they have optimal experiences.

“The improved information management tool will enable us to better protect our assets, service our internal and external customers, and enhance community-building for our employees,” says Beaumont.

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: www.microsoft.com

For more information about Parks Canada Agency products and services, visit the Web site at: www.pc.gc.ca

Microsoft Office System

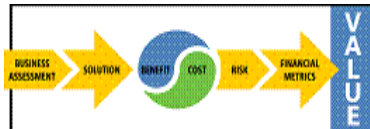
The Microsoft Office system is the business world's chosen environment for information work, providing the programs, servers, and services that help you succeed by transforming information into impact.

For more information about the Microsoft Office system, go to: www.microsoft.com/office

About Business Value Assessment

This business value research study was developed by Capgemini using the Microsoft Rapid Economic Justification (REJ) Framework to assess the business value of the 2007 Microsoft Office system.

For information on how to repeat this study for your organization, contact your local Microsoft representative or go to: www.microsoft.com/value



Software and Services

- Microsoft Office Professional Plus 2007
- Microsoft Office Excel 2007
- Microsoft Office Outlook 2007
- Microsoft Office PowerPoint 2007
- Microsoft Office Word 2007
- Microsoft Office SharePoint Server 2007