

TECHTONICS CASE STUDY

Enabling Efficiencies in the Medical Council's Health Services: A User-Centric Approach to Content Server

The Medical Council of New Zealand and Techtonics have been working together since 2007.

Document Management forms a core part of their business with the need to manage, store and retrieve correspondence and documentation related to the registration and monitoring of doctors.

With the end of support and the need to revisit key processes to adapt to business changes, the Council decided to move from eDOCS to an OpenText Content Server. The decision to stay with OpenText was straightforward: they had been very happy with OpenText eDOCS and wanted an easy migration between OpenText products, which also provided a cost effective solution in terms of licensing.

Their decision to stay with Techtonics was even simpler: they knew Techtonics had a thorough understanding of the two products, how they integrated to other Council systems and how their organisation worked.

The Council were confident that Techtonics would simplify the transition, connecting their technology and meeting their business needs.



Challenges

The Council had been using OpenText eDOCS since 2007. They had a system that was customised to their unique business processes and requirements, with complex integration to their bespoke registration system.

A major driver for change was the impending end of main-stream support for the eDOCS 6 product. As a legacy product, eDOCS did not support newer versions of Microsoft Office suite and Windows Server. The Council were also using Windows XP, which was no longer supported by Microsoft.

Their eDOCS implementation had run smoothly, however, their business processes had evolved and the system no longer matched their requirements. Some users were frustrated and felt the system was too rigid or complex for the day-to-day tasks

they needed to perform. For example, detailed metadata collection was deemed unnecessary by some users and productivity was hindered by a system that would only allow a document to be assigned to one stage of any given process.

The organisation needed to implement a great deal of change in a small amount of time, changing to a new Document management system, desktop and server operating systems and Microsoft Office suite.

The Solution

Techtonics and the Council agreed to take a user-centric approach to their migration to Content Server, recognising that implementing a new Document Management system is much more than simply installing the software. Techtonics worked with the Council conducting extensive initial analysis and workshops with end users to fully understand the business's current and

future needs.

"The pre-delivery stage was excellent," says Andrew Cullen, the Council's Senior Information Systems Analyst.

Involving users early in the project meant they were engaged and ensured their specific requirements were addressed.

"Our staff really enjoyed working with Techtonics. The user workshops and the thorough documentation of requirements and design went really well"

Flexible document control was an area targeted for improvement. Challenges with the content deletion process were resolved in a way that managed auditing of deletion to satisfy the business requirements, whilst keeping the user experience simple.

"We've been able to find a healthy compromise between people being able to delete stuff and have it 'disappear', and being able to keep track of who is deleting things and why. We have a process now that delivers both of those," says Andrew. "It's a little thing but for staff it's important."

It was a similar case with **version control**. "Before, in eDOCS, if you made the latest version in PDF, that's it. You couldn't open the original Word document." Versioning in Content Server is a favourite feature of staff. They appreciate the ability to create complex versions of documents that can be associated to multiple steps and in any process.

The complex metadata implemented in eDOCS was also reviewed and streamlined. Users no longer have to populate fields that are not relevant for the specific task they're doing. Instead, they can move on with their task, using intelligent defaults or move to a secondary profile to complete the required fields if needed.

Along with making it easy to get documents into the new system, it's also easier to find them. Staff sing the praises of the **advanced search capabilities** of Content Server, "... people love using the content filter and filtering down using the facets to get what

they want." Peter Searle, Chief Financial Officer, also notes the improved search functionality in Content Server, "It's a much better system. I was looking for a document that I did 12 months ago... it came up straightaway. Under the old system it would have taken me a while to find."

Search efficiency is not just limited to one off document retrieval and has been used to improve other areas of the business. By combining the power of the Content Server search engine with **WebReports**, the Council and Techtonics were able to create a custom view to return users' specific content for action or review. This included newly scanned documents that needed to be processed individually in order to correctly identify the doctor and team to which they relate.

The revised process implemented in Content Server "... really helped our staff to find their documents as they were coming in and pick them up without having to dig through. Something that would have been very difficult to do in eDOCS," says Andrew.

Results, Return on Investment and Future Plans

Engaging users early in the project ensured the Council and Techtonics have a new system that meets the various user requirements, making their jobs easier, whilst still ensuring consistency and standards across the wider business. Immediate productivity gains have been observed through the implementation Content Server, including:

- Simpler metadata capture
- Greater ease of discovering content using search and WebReports
- Reduced occurrences of deleted or miss-saved documents
- A system that is adaptable to business requirements
- Upgraded desktop and Microsoft Office suite

Future projects include implementing remote access to Content Server using OpenText Tempo, and further using reporting to expose custom views of content tailored for particular teams and business functions.

When asked where staff are now, Andrew says that they are now looking to build on the system and utilise extended functionality "Staff have adjusted to being on a new system and are looking for enhancements and improvements."

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