

Canadian Conservation Authority Uses GlobalSearch® to Help Save the Environment

Located in Ontario, Canada, the St. Clair Region Conservation Authority is a non-profit organization committed to implementing programs that reduce the risk of flooding and erosion. St. Clair is also focused on water and land stewardship, wildlife habitat creation, and outdoor recreation. The organization's commitment to environmental health has made their increasing piles of documents counterproductive. With a mission to improve business processes while helping the environment, St. Clair decided it was time to search for a document management solution that met their needs.

St. Clair, admittedly, had many paper-based processes that desperately needed improvement. Especially since paper is handled in virtually all of the organization's departments. The Planning and Regulations department sees the most incoming paperwork, on top of the fact that every document since St. Clair's beginning needs to be retained. The paper never seemed to stop! The organization had accumulated so much paper over the years that their vault began to overflow and some records even needed to be stored off-site.

Unlike many non-profit organizations, St. Clair had tried their hand at a digital filing system in the past, but it proved to be quite complicated. Especially when it came to locating files. Despite the fact that the system was put in place to make paper-based processes more efficient, it was not always foolproof and required a lot of manual data entry. Often leaving the staff at St. Clair feeling like they were writing documents twice!

The goal was to capture all of the nonprofits documents and securely store them to allow for easy and streamlined retrieval. But, physical documents were impossible to locate between desks, vaults, and off-site storage. Because of their significant workload increase, St. Clair knew it was time to invest

in a system that would truly benefit the organization's workflow, knowing that when the right software is working properly, it can quickly pay for itself in time savings!

Due to the organization's experience with the flawed system, it was very easy for them to outline their pain-points. Whatever their current system was doing, they wanted the opposite! That's where Square 9's GlobalSearch software comes in. St. Clair was in desperate need of a software that allowed them to reduce paper,

Snapshot

Industry:

Environmental Science and Conservation

Departments Impacted:

Planning and Regulations Department

Featured Products:

GlobalSearch Browser Client, GlobalCapture

Objectives:

Support web-based and online transactions, capture and retrieve documents, and diminish paper files.

especially when the organization's mission is to support the environment. Saving paper - and trees - was of high importance, as well as simplified access to documents and their data.

With GlobalSearch, Square 9's award-winning document management solution, all of their problems were solved! Not only was the software much more efficient than their last system, but GlobalSearch opened their eyes to all of the ways a document management system can support an organization. **From the initial installation, St. Clair was immediately impressed with how easy GlobalSearch was to configure.**

In no time at all, GlobalSearch was up and running!

St. Clair utilized many of the software's features, including the ability to integrate with third party software like Microsoft® Office, which has improved the organization's workflow considerably! Even more, since the implementation of GlobalSearch, St. Clair is now able to email receipts generated by their online payment system. And once a month, the St. Clair Finance Department receives an export of all payments received, importing directly into their accounting software. **These time savings equate to about a day per month for the accounting staff! Even the Planning and Regulations Department is saving time, without the dreaded document search. To date, about two hours every day are saved!** Thanks to GlobalSearch, St. Clair Region Conservation Authority can continue to focus more time on their mission of preserving our environment.

For more information on St. Clair Region Conservation Authority, visit <https://www.scrca.on.ca/>.

**2 Hours
Saved
Each Day**



**Easy to
Configure
and Use**

Interview: Chris Durand

IT/GIS Coordinator, St. Clair Region Conservation Authority

Q. What criteria did you have in mind when searching for a document management solution?

Chris Durand: We wanted a system to reduce paper and improve access to documents and information. Upon doing more research we learned that a document management system can do so much more than just store and retrieve documents. Something that shouldn't be overlooked are the efficiencies that can be experienced by automating how the documents end up in the system! Our ultimate goal was to have a solution where documents get into the system automatically, indexing them with as little intervention as possible, and then storing them efficiently for easy access. And of course, it has to be easy to use and configure.

Q. Why did you choose Square 9 over the competitors? Are there any specific features you favor?

Durand: We initially hadn't heard of Square 9 and in our evaluation of other systems, we actually purchased something else. Then something bad happened – the consultant we had hired after purchase closed up shop and after a year we were basically left with nothing to show for it, other than a complicated piece of software that we didn't know how to use and couldn't get help with. In a twist of fate, I ended up in discussion with an employee of an Authorized Square 9 Reseller who, upon hearing our sad story, and in recognition of our lost investment, was able to work out a deal with Square 9. The only catch was that we committed to 3 years of maintenance and support from Square 9 which has been worth its weight in gold! The icing on the cake was that the solution was SO much better than any of the other solutions we looked at.

Q. How is your company leveraging GlobalSearch and which departments are using it daily?

Durand: GlobalSearch is limited to our Planning and Regulations Department with minimal use by others. We have an online payment system from our website where payments are processed for many things including: permits, municipal plan review comments,



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**- Chris Durand
IT/GIS Coordinator**

memorial tree dedications and conference registrations. Our main focus has been to improve the workflow for our regulations and planning staff by automatically indexing all documents they create (so we no longer have to physically log and file them). Countless hours will be saved through elimination of data entry and creating summary reports, let alone improved access to documents that are normally filed away in our vault.

Q. Would you recommend Square 9's solutions and why?

Durand: Absolutely! The software is great and keeps getting better. The support has also been great. I've contacted support numerous times for help and the support staff have always been knowledgeable and quick to respond. The fact that the system is modular is also great because it allows you to grow with the system and acquire additional functionality when you're ready for it. Unlike the previous "solution" we implemented, the Square 9 system has been so much easier to maintain from an IT perspective.