

Staying compliant ‘inside the box’

Kiosk of electronic regulatory information helps Bell Canada assure compliance with government agencies

Bell Canada has developed an innovative approach to effectively communicate and comply with regulations set by various government bodies. The Web-based system, known as the Electronic Regulatory Information Kiosk (ERIK), streamlines regulatory processes for Bell and its partner companies so that their responses are timely and appropriate to the growing demands for compliance.

The Canadian leader in communications—with 28 million customer connections including telephone services, wireless communications, high-speed Internet, digital television and voice-over-Internet Protocol—sought to establish a centralized, Web-based library to hold more than half a million records to simplify compliance with the regulations of government departments and regulatory agencies including the Canadian Radio-television and Telecommunications Commission (CRTC) as well as the Competition Bureau and the Privacy Commissioner of Canada.

Open Text solution expanded and customized

To solve these challenges, Bell needed an electronic solution with effective search functionality. The organization determined that it made the most sense to expand and customize Bell’s existing Web-based, secure, centralized solution, Livelink ECM from Open Text. The Livelink ECM upgrade that resulted in ERIK automates Bell’s complex collection and management process for tariff filings, and streamlines its delivery of sophisticated records and archival management services.

“As a result of implementing Livelink ECM solutions, Bell Canada has recognized improved productivity and efficiency, as well as time saved related to our employees’ abilities in finding, accessing and retrieving vital regulatory documentation. Our ability to effectively comply with CRTC regulations has been critical to managing risk and protecting Bell Canada’s public image and brand.”

Sonia Diaz-Sotomayor,
Associate Director – Regulatory
Information Services, Bell Canada

The Regulatory Affairs department of Bell Canada advocates the interests of the organization before CRTC hearings and other reviews by governmental agencies. As such, that department must manage all documentation related to the awarding of broadcasting licenses, the approval of tariffs, and the review of corporate mergers and acquisitions. However, Regulatory Affairs was being hindered in its critical mandate by the lengthy process of gathering records, in paper format and otherwise, scattered across Bell and its family of companies.

“In order to deploy the system, we had to collect more than 200,000 documents dispersed throughout our organization, mostly legal in nature,” says Sonia Diaz-Sotomayor, Associate Director – Regulatory Information Services at Bell Canada. “These documents were either scanned documents into the system, or kept in physical format.”

On budget and on time

“Our first step was to analyze our processes; for which task we had engaged Open Text Global Services,” says Diaz-Sotomayor. “During the initial implementation—and more recently, our upgrade—the involvement of Open Text was critical to bringing project team members up to speed on the new features and capabilities.”

Open Text Global Services’ depth of ECM experience and expertise helped Bell identify shortcuts for implementation, keeping the project on budget and timeline targets. Additionally, through this process, Bell project members became better equipped to explain and “sell” the system benefits to internal stakeholder and users.

Industry

Telecommunications

Customer

Bell Canada

Business Challenges

- Answer growing and changing demands around complying with government regulations
- Ensure easy access to thousands of documents scattered across a family of companies
- Reduce lengthy document retrieval and processing times
- Leverage investment in existing Livelink ECM infrastructure

Business Solution

Livelink ECM

Business Benefits

- Compliance with CRTC regulations
- Effective handling of new tariff or new regulatory processes
- Centralized system for regulatory information
- Improved business process management
- Improved productivity and efficiency
- Competitive edge
- Savings in cost and time

Streamlining a key business process

Bell Canada worked with Open Text Global Services to tailor the system to meet specific electronic library system and application requirements, such as the Tariff Approval Process—one of the major business processes within Regulatory Affairs and, therefore, the most significant custom module in ERIK. A tariff is a loose-leaf document, usually one page in length, containing very specific information regarding goods and products offered. The ERIK system supports more than a dozen types of tariff documents, which have controls associated with them (such as specific access restrictions or bi-lingual formatting requirements).

Publishing to the intranet

Internally, the ERIK system accommodates the Special Assembly Catalogue (SAC), an area where information about Bell and customer-related systems, services and equipment is classified descriptively. SAC-related metadata is extracted from ERIK and published to Bell’s intranet. ERIK was also customized for the purpose of Regulatory Information Services (RIS)—a general filing storage area for Word documents, spreadsheets, images and data files, where they are retained forever. RIS includes methods of managing vendors, clients, document check-in/out, and extending a loan period, as well as a reporting component to support these activities.

Notably, we’ve recently completed an upgrade of the production system from Livelink ECM 8.1.5 to Livelink ECM 9.5,” says Diaz-Sotomayor. “By reviewing the existing system with Open Text, we were able to identify functionality and areas where customizations could be addressed with out-of-the-box features... For example, the RIS Library is now 80 per cent ‘out-of-the-box’ using core Livelink ECM, which will help us with future upgrades,” she notes.

Employee impact

The consumers of information are the general public through select content published to Bell’s Web sites, as well as Bell employees, who access the information via the intranet. Regulatory Affairs is responsible for ensuring that Bell employees across the country understand and implement the various regulatory requirements. Particularly for Bell’s power users, Livelink ECM Fundamentals training from Open Text significantly helped with employees’ proficiency with the ERIK system. “Open Text training was a clear enabler for user adoption,” notes Diaz-Sotomayor.

About 70 employees within Regulatory Affairs use the ERIK system, with other users from such departments as Taxation, Classification, ISIT, and Translation. They regularly use Livelink ECM – Workflow to input regulatory, pricing, and classification information in English and French.

Bell employees can now easily find the content they need through improved product enhancements with search—and overall optimized system performance—and they can trust this to be the most accurate and up-to-date information. Users can focus on their essential job tasks, rather than spend hours on locating electronic and paper documents.

Management has peace of mind that regulatory documentations are securely housed and accessible. And staff at the library-related services within Bell has experienced significant productivity gains related to cataloging batches of information, and reduced time spent managing and tracking information.

Avoiding risks, protecting the brand

Bell Canada has benefited from better performance, both in accelerated response time and through enhanced search, with the upgraded version of Livelink ECM. The ERIK solution means that Bell can easily manage and access all documentation—so that the organization is now better able to comply with regulations imposed by the CRTC. “Our ability to effectively comply with CRTC regulations has been critical to managing risk,” says Diaz-Sotomayor, “and protecting Bell Canada’s public image and brand.”

She adds, “As a result of implementing Livelink ECM solutions, we have recognized improved productivity and efficiency, as well as time saved related to our employees’ abilities in finding, accessing and retrieving vital regulatory documentation. By establishing a centralized system, our accuracy and visibility over documentation has improved, and we are able to avoid erroneous information.” That means lower costs associated to re-tracing very specific regulatory related processes, and assuring archival of key regulatory related documentation.

Next steps

The Open Text solution—now in its second major release—has proven successful for more than six years. Bell Canada is now looking at automating further business processes through the use of ECM workflows. The organization plans to extend the ERIK service to other Bell units, such as Bell ExpressVue, to handle their regulatory information. The company is well-prepared to handle the ongoing rollout of new tariffs and regulatory processes, with its centralized solution for managing that type of information.



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Sales	Americas	Europe	Asia/Pacific	
<p>www.opentext.com sales@opentext.com</p> <p>North America Sales 1-800-499-6544</p> <p>International Sales +800 4996 5440</p>	<p>United States 100 Tri-State Int'l Pkwy Lincolnshire IL 60069 Phone: 847-267-9330 Fax: 847-267-9332 Toll Free: 1-800-538-7723</p>	<p>Germany Technopark 2 Werner-von-Siemens-Ring 20 D-85630 Grasbrunn Phone: +49 89 4629 0 Fax: +49 89 4629 1199</p>	<p>United Kingdom Grosvenor House Horseshoe Crescent Beaconsfield Buckinghamshire HP9 1LJ Phone: +44 1494 679700 Fax: +44 1494 679707</p>	<p>Australia Level 12 65 Berry Street North Sydney, NSW 2060 Phone: +61 2 9026 3400 Fax: +61 2 9026 3455</p>