



CASE STUDY: IMMIGRANT SERVICES CALGARY

Client Management Solution

CHALLENGES

Immigrant Services Calgary (ISC) was looking for a service case management solution that would be able to track the needs of new immigrants in the area and coordinate staff and volunteer resources to maximize the effective delivery of support services.

ISC required a robust database and software system that would be able to handle dozens of concurrent users, store and index thousands of records, and closely control data entry and viewing permissions by user roles to protect confidential client information.

The system needed to be flexible enough to allow new programs and new services to be added as needed, and handle a diverse requirements for filing performance reports to various funding agencies. It also had to be able to import existing data into the new system.

A summary of ISC's needs are:

- Deliver a visual schedule of volunteer resources.
- Handle wait lists and notifications.
- Allow feedback and notes to be centrally stored.
- Provide web based access for remote users.
- Maintain up to date lists of service providers.
- Export user customizable reports in Microsoft Office formats.

BACKGROUND

Established in 1977 as the Calgary Immigrant Aid Society.

Immigrant Services Calgary is one of Alberta's longest serving and most comprehensive settlement agencies dedicated to ensuring that immigrants and their families have the opportunity to become successful members and contributors in the community they choose to call home.



SOLUTION

Fdata was able to quickly deploy a comprehensive solution by leveraging the modular Fdata Business Suite (FBS). This allowed the development team to focus on designing ISC’s service processes and automating organizational workflow.

Fdata’s business analysts worked with ISC staff to customize the FBS Contact Manager Solution to record the exact information needed for their operation and fulfill the scheduling and data reporting requirements.

A working prototype based on Fdata’s Contact Management Solution was quickly deployed for ISC to test and provide feedback that was incorporated into the solution for further testing.

This reiterative process ensured the solution would meet the exact requirements of all users and handle the complete lifecycle of a contract.

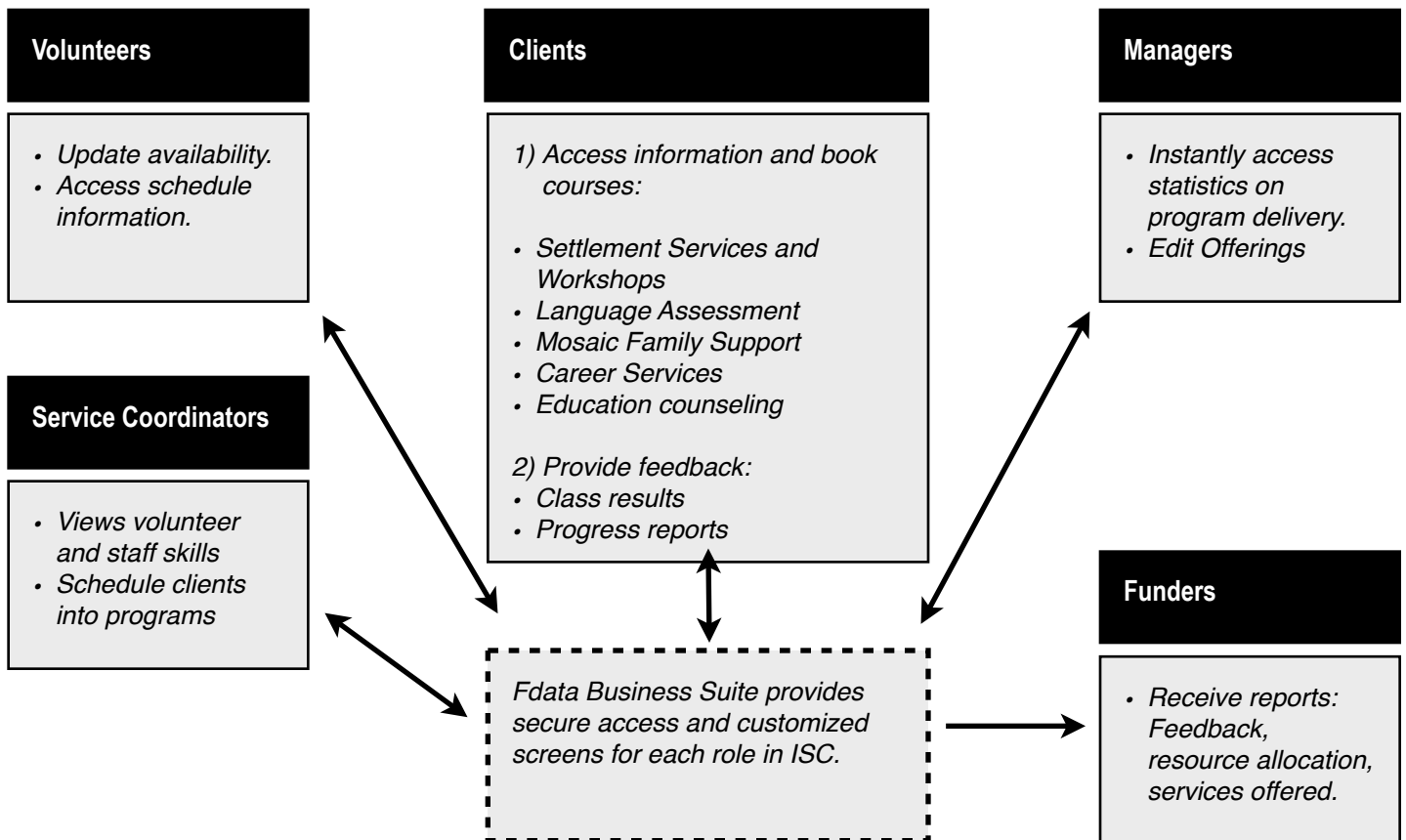
MODEL FIRST APPROACH

Fdata uses a “model first” methodology to customize it’s management software for each client’s unique needs.

Below is an abbreviated version of one of the workflows implemented for Immigrant Services Calgary.

Notifications, client and service provider records, and scheduling are all incorporated into the data management solution.

This allows the software to handle the exact needs of each organization and automate any data governance policies.





SOLUTION COMPONENTS

Fdata's Business Suite is built on an Oracle database that ensures Immigrant Services Calgary data is stored securely and with managed access throughout the organization.

The use of advanced Java solutions allow the software to be accessed remotely and run on various software systems.

For the ISC system, the following FBS solutions were incorporated:

Contact and Volunteer Manager– This handles management of an individual's contacts including clients and volunteers, and provides a set of permissions for who was allowed to view, modify, or edit which datasets belonging to each record.

Business Process Manager - This allows service delivery procedures to be set directly within the database and enforce standardized training regulations.

Operations Manager - This provides the ability to open a service order for any client and allows coordinators to enroll clients in classes, schedule counseling, or arrange for additional services.

Scheduler - This allows volunteers to visually enter their availability and provides volunteer and service delivery coordinators the ability to manage resources and connect volunteers to clients.

Import and Export - This allows legacy data to be imported into the system and provides future opportunities to share subsets of data with other systems.

Document Builder - This generates reports in standard Microsoft Office formats to be sent to reporting agencies. Summary evaluations of training classes and delivered services are also provided.

TECHNOLOGY

Oracle Databases are very robust and scalable.

Fdata has built a set of tools around Oracle and Java that reduced development time while relying on best-in-class tools.

MODULAR SOFTWARE.

Fdata's Business Suite includes dozens of modules that handle hundreds of common business tasks.

Depending on the needs of the individual organization, some or all of these modules can be loaded.

If an organization needs their management software to handle different tasks in the future, additional modules can be loaded into the software and added to the workflow.

Fdata's Business Suite can handle 100% of an organization's immediate needs, while having the flexibility to adapt or incorporate future items.



RESULTS

Immigrant Services Calgary's needs were met with the Foundation Business Suite. Within an accelerated time frame the entire project was moved from a testable prototype to a finalized product with 3 distinct workflows, 176 screens and over 30 reports.

While customized code was required for managing specific workflow scenarios, the bulk of the project was based on existing modules which significantly reduced the time and cost of developing the solution. This saved the client tens of thousands of dollars in development processes and required minimal relocation of internal resources. EM was able to begin testing the processes and providing feedback while the application was being tuned for their specific needs.

The robustness of the Fdata Business Suite allowed a single integrated solution to handle various needs including volunteer management, client services, and scheduling requirements.

This allows the organization to enforce training requirements for volunteers and implement workflows that meet privacy legislation and provide comprehensive reporting.

WHO BENEFITS?

Volunteers can easily update their schedules and track their training processes.

Service coordinators can quickly find availability of volunteers by skill set to assign clients.

ISC managers can review program delivery and evaluate success rates for future planning purposes.

Public and private funders can receive exact information on the success of various programs, client feedback and ROI of service delivery.

New immigrants have instant access to comprehensive information and resources through Immigrant Services Calgary.

WHY FDATA?

Fdata's core team has built data entry applications for over 15 years and are experts at designing, customizing and testing database applications.

Together, with the help of a team of developers, project managers, business analysts and software architects, our team has built hundreds of web and desktop business applications.

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