

Conservation Halton: Digital Transformation

OVERVIEW

Supporting Conservation Halton's vision of a modern, paperless organization through the strategic digitization of legacy records, enhancing productivity, ensuring compliance, and reducing storage costs.

ABOUT OUR CLIENT



Established over 60 years ago, Conservation Halton was originally founded to protect Ontario communities from flooding and erosion. Today, the organization's mission has evolved to address modern environmental challenges by preparing communities for the effects of climate change, supporting sustainable development, managing natural resources across the watershed, and connecting people with nature through recreation and education.

Governed by a Board of Directors appointed by participating municipalities including Halton, Peel, The County of Wellington, and surrounding regions, Conservation Halton operates under the Conservation Authorities Act of Ontario, administered by the Ministry of Natural Resources. This governance structure includes both elected municipal officials and citizen appointees who help shape the organization's policies and direction.

Proceed to next pages for case study

Secure Document Scanning for Overwhelmed Paper Systems



Limited Physical Storage to House Paper Records



Inefficient Processes and Retrieval



Risk of Loss or Damage



Security Concerns

The Challenge

In 2017, Conservation Halton initiated a strategic transformation through its plan, Metamorphosis, laying the groundwork for a more agile, efficient, and sustainable organization. A key pillar of this transformation was digital innovation which aims to shift away from paper-based records to a fully digital environment.

The challenge was significant paper files accumulated over decades across multiple departments, including Finance and Accounting, Procurement, Human Resources, Foundation, Conservation Lands, and Planning & Regulations. Staff faced daily hurdles in retrieving and managing documents, and physical storage space was stretched to capacity. The risk of damage or loss due to unforeseen events further highlighted the need for a secure, reliable digital solution.

To help digitize the high volume of legacy records, Conservation Halton sought a partner with the expertise and security infrastructure to deliver seamless, accurate, and efficient results.

The Solution

Octacom was selected as Conservation Halton's trusted digitization partner, tasked with the secure and systematic scanning of millions of hard copy files. All digital files are delivered directly into Conservation Halton's SharePoint environment, integrating smoothly with existing workflows and systems.



DIGITAL TRANSFORMATION SOLUTION

Octacom's full-service solution included the following components:

- › **Strategic Scoping:** Collaborated with Conservation Halton to assess records by type, condition, and department, determining tailored scanning requirements
- › **Secure Transportation:** Coordinated the safe transfer of physical files to Octacom's scanning facility
- › **Document Preparation:** Performed detailed prep including staple and carbon page removal, slip mounting, sorting, and identifying misfiled documents
- › **Digitization:** Scanned documents of varying formats and sizes into searchable PDF files using Optical Character Recognition (OCR)
- › **Indexing and Output Delivery:** Ensured all digital files were correctly indexed and uploaded to Conservation Halton's SharePoint for ease of access and retrieval
- › **Secure Document Destruction:** Provided shredding services for physical records post-digitization, freeing up valuable office space



The Results

With a strong commitment to innovation and sustainability, Conservation Halton is well on its way to becoming a fully digital organization. To date, Octacom successfully digitized approximately 2 million images of records.

What began as a pilot project in 2022 has evolved into a long-term engagement, continuing into 2025 to further support Conservation Halton's digital transformation journey.

Through this ongoing partnership, Octacom has enabled Conservation Halton to:

- › Enhance operational efficiency through quick and secure access to digital records
- › Improve document searchability and internal sharing across departments
- › Ensure regulatory compliance for record retention and secure destruction
- › Reduce physical storage needs and associated costs



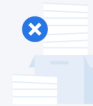
Easy and Secure Access



Searchable and Transmissible



Ensure Compliance



Reduce Physical Paper Storage

More Case Studies

Learn more about how our solutions and services have helped our clients.

LAFARGE

Improved processes related to managing over a half million delivery tickets annually.

AIR CANADA

Turn-key solution handles over 500,000 air waybills and 1.5 millions documents annually.

SALVATION ARMY

Integrated their ERP solution to centralize and automate invoice processing.

VOTORANTIM CIMENTOS

Improved processes related to storing and reproducing shipping waybills and tickets.

ONTARIO POWER GENERATION

Created a custom Accounts Payable Automation solution to manage over 110,000 invoices.

ESTÉE LAUDER COSMETICS

Eliminated manual process for retrieving, handling, filing and distribution of HR records.

YORK REGIONAL POLICE

6,000 employee files effectively converted into secure digital images, indexed and uploaded.

WORLDSOURCE FINANCIAL

Created a custom document management portal and workflow solution.

VITALAIRE

Eliminated manual processes for tracking, filing and retrieval of paper-based POD documents.

ROOTS OF EMPATHY

Survey capture and processing services for over 9,000 parents responding to the survey.

MIDWIVES' CLINIC OF EAST YORK-DON MILLS

Provided document scanning services and secure cloud hosting of digital Patient Records.

HEAD OFFICE

45 Staples Avenue, Suite 120
Richmond Hill, ON L4B 4W6

CONTACT US

T 905 737 0700
F 905 737 7185

info@octacom.ca
www.octacom.ca

ABOUT OCTACOM

Octacom is an enterprise software and services company focused on document and data management solutions. Founded in 1976 and headquartered in Richmond Hill, Ontario, Octacom specializes in document management and workflow automation software as well as document imaging services, and leverages its proprietary Odiss™ Document Management Software to provide a robust, secure and cost effective solution to clients globally across a wide range of industries.