Automating the Committee's Branch in Ontario

by Lisa Freedman, Tom Prins and Paul Berry

It is unlikely that terms like 'computer-guru', 'code-wrangler' or 'programmer' would appear anywhere in a lexicon of Clerkly descriptors. However, a casual stroll through the Committees Branch of the Ontario Legislature in 1999, would have uncovered a group of Clerks gathered about a computer terminal discussing the flexibility of their new search engine, how to most effectively implement 'wildcards' in their SQL queries, or how to quickly retrieve statistics on the number of written submissions tabled at hearings held five years ago. This article looks at how the Clerks of the Ontario Legislative Assembly used technology to help them do their work.

Not long ago, had you asked Ontario Clerks whether they felt a pressing need for computer gadgetry you might have been greeted with a snort of disdain. The old quill-and-paper method was quite sufficient thank you very much! But with the rest of the world racing forward at megahertz speed, increasing the demand for almost instantaneous access to information, the Clerks at the Committees Branch in Ontario began to consider the benefits of office automation.

In part, the decision to examine the role that computers could play in the operations of the Committees Branch was inspired by curiosity. It seemed the whole world was talking about computers and we were becoming rather self-conscious about our antediluvian practices. But the primary motivator was that proverbial mother of all invention: necessity. An ever-increasing number of people requesting appearances before committees, coupled with a short lead-time between bill referrals and hearings, meant that the existing scheduling system could barely keep up. On numerous occasions committees received hundreds of amendments tabled to a given bill, resulting in Minutes of Proceedings that were hundreds of pages in length. Staff changes, and the subsequent loss of corporate memory, required a more concentrated effort to organize our procedural and administrative information. It soon became apparent that, by reducing repetitive clerical tasks, or by simplifying time-consuming duties with the aid of computers, a Committee Clerk could focus his or her expertise on the primary role of providing procedural research and administrative support to the Standing and Select Committees of the Legislature.

The Committees Branch began its search for time-saving technology in the early 1990s. We approached the Assembly's computer department for help in developing a database. Our requirements were, by database standards, rather simple. We needed to store the contact information of potential witnesses, generate standardized reports, and produce agendas, lists of exhibits, confirmation letters and various statistics for use in Business Summaries.

At that time, the Assembly's computer department was experiencing problems implementing a network so-

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lution so they encouraged us to look for a branch-level solution. After searching the marketplace and testing a few software applications we decided to purchase a $20 DOS program called "Key Contact Tracker". This simple solution crudely addressed some of our immediate needs, but when the Assembly switched to the Windows 3.1 operating system Key Contact Tracker began to cause problems and when Windows '95 became the standard, Key Contact Tracker was rendered completely incompatible.

> *When we put together two major factors—the sheer number of people wanting to appear before Committee and the short lead time between bill referral and hearings—we found that we were drowning in paper.*

It was at this time that we learned that both the House of Commons and the Senate were developing similar software solutions to address very similar types of needs. During a parliamentary exchange, one of our Committee Clerks discussed these initiatives with representatives from both the House and the Senate. After additional reflection and testing, Ontario decided to follow the Senate's lead and use the power of the programs in Microsoft Office to automate our Branch.

The decision to use Microsoft Office enabled us to develop software solutions for ourselves, solutions that were designed specifically to suit our needs. This freed us from dependence upon other departments to maintain or change our customized applications. In the end, our office automation plan included four distinct, homegrown, applications: a fully functional scheduling database, designed and programmed in Microsoft Access; a Microsoft Word template that automates and enhances the production of Minutes of Proceedings; a Branchwide, limited-access, intranet site used as a one-stop reference source; and a powerful search engine, designed using Microsoft's Index Server software, used to retrieve specific information from our Minutes of Proceedings, minutes of meetings of our Chairs and Vice-Chairs and our Intranet site. More detailed descriptions of the development and implementation of these applications follows.

Committees Branch Scheduling Database

The primary purpose of developing our database was to provide users with a repository of requests to appear before Legislative Committees. Historically, when members of the public wished to appear before a Standing or Select Committee they contacted our office in writing or in person and a form was filled out with the pertinent information (name, address, phone number and preferred city for presentation). This system worked very well for the most part.

Over the years, however, it became increasingly urgent that the system be revised. We lacked a quick ability to provide reports that the Committees were now requesting (i.e. lists of witness requests, confirmation letters, and previously recorded witness information).

The Scheduling Database—programmed using Microsoft Access and Visual Basic for Applications (a simple programming language that has been built in to all of the Microsoft Office products)—allows centralized logging of witness information that can be accessed over the internal computer network by any member of the Branch's staff. This eliminates the previous practice of duplicating data each time a given witness requested standing before a committee, or on more than one item of committee business. It further allows, during particularly busy times, the delegation of scheduling responsibilities to more than one staff member.

The database also provides users with the ability to produce statistical summaries of committee hearings, confirmation letters and other standardized correspondence, lists of witnesses organized by their places of residence and proximity to scheduled locations of hearings, access to archived records from previous years, as well as fully formatted agendas that can easily be updated and modified to reflect spur-of-the-moment scheduling adjustments. Any of these documents can be printed, transferred to a word processing program, faxed or emailed as necessary.

Automating the production of Committee Minutes

The production of Committee Minutes has always involved the time-consuming drafting, proof-reading and redrafting (as many times as is necessary to ensure accuracy) of standardized procedural text. While the production of these official records requires vigilant attention to detail, we found that many of the errors appearing in draft Minutes of Proceedings were simple typographical and formatting mistakes.

In order to minimize the number of drafts a Clerk had to review and revise, we decided to develop a Template that would automate some of the more repetitive entries and formatting in our Minutes. As these documents are often very large (some exceeding one hundred pages in length), considerable time and supplies could be saved if the number of drafting errors was reduced. This would also allow the Clerks to focus more on the content of the Minutes on their first review, ensuring accuracy of pro-

cedural details, rather than on cosmetics and copy-editing.

The Template began as a series of macros that were recorded in order to speed up the production of Minutes of Proceedings. Because the contents of the Minutes often consist of standardized wording, it was a simple task to input the most common entries (e.g. "The question being put on the motion, it was carried.") using the built in macro recording feature found in Microsoft Word. This feature of Word also allows users to edit their macros using Visual Basic for Applications (VBA), enabling users to customize software to suit very specific needs.

Prior to using VBA in Word, we had no programming experience. It was as a result of 'hacking' around with the macros we had recorded and seeing what effect those adjustments had on the output, that we began to develop a rudimentary understanding of the language. Many hours, many errors, and a few books later, we were able to expand the Minutes Template beyond its initial collection of macros.

Short of getting into a full technical description of the inner workings of the Template, we were able to create customized menus and a number of useful 'Input Forms' that, with a mouse-click, can format and insert standardized Minutes entries, retrieve and manipulate information from the Committees Branch Scheduling Database, and open other Input Forms.

The Input Forms are perhaps the most interesting aspect of the Template. These are designed to prompt users to enter summarized data, specific to a given Committee meeting. This data is then automatically formatted in accordance with the Committees Branch style guide, and inserted into the body of the Minutes. In certain cases the values entered into a form are assessed by the program and cause other Input Forms to open. For example, if the user is preparing Minutes for the first committee meeting of a parliamentary session, the computer will open a form that prompts the user to enter the names of the newly elected Chair and Vice-Chair of the Committee, as well as the Members appointed to the Sub-committee. This information is then imbedded within the standardized text of a Committee's organization meeting, formatted and inserted into the document. Another form was designed to process information about a Committee's adjournment and reconvening times and locations. And yet another enables users to easily calculate the exact amount of time a Committee has spent during consideration of a given matter.

In summary, the Minutes Template offers users the option, without over-riding the standard word-processing functions of Microsoft Word, to reduce the repetitive typing of common Minutes entries, maintain adherence to Committees Branch style guidelines, and thus reduce the number of drafts of a given set of Committee Minutes. The Template is easily modified to include revisions to the style guidelines, and is open to development by any user who wishes to expand its functionality.

Branch-wide Intranet Site and Search Engine

In many respects, the intranet site was the most enjoyable part of our automation project. The end goal was to provide an easily accessible repository for useful committee information, both procedural and administrative.

Like many legislatures, we have our share of administrative and procedural binders that we update over time. The ongoing updating process is usually reserved for election time and is not a project that is high on anyone's list of election tasks. In many cases, we were ashamed to admit, our binders had not been updated in recent times. In addition each committee clerk has a certain amount of autonomy in the administrative workings of their committees. Thus, we found ourselves with a diverse collection of materials.

Quite literally dumping all of the accumulated paper on the floor, we combed through it to find what was useful and what was garbage. This process resulted in some friendly bantering around the Branch as the Clerks debated the relevance and/or obscurity of items in each other's widely varying collection of documents. Some clerks had retained cosmic quantities of information on every procedural situation they had encountered, or had ever dreamed of, while others Clerks relied on a good memory and a tattered set of Standing Orders. An unforeseen outcome of this leg of our project was that, in our enthusiasm, we actually updated everything in the branch! When we had collected all of the material we wished to preserve, we scanned everything that was not already in computerized format and, using Microsoft Word, saved the documents as internet pages (html), all of them linked to a single table of contents page complete with graphics and hyperlinks. Ultimately the table of contents, while providing all of the information, needed a search engine attached to it so that specific information could be accessed quickly.

As it happened, the Assembly's computer department had recently upgraded the operating system of our computers from Windows '95 to Windows NT. Packaged with Windows NT, we discovered, is a very powerful, and fully programmable search engine called Index Server. We were able to develop an on-line search page that enables us to retrieve information from anywhere on our intranet site.

Conclusion

The products of our foray into the arcane world of computer programming and development have proven indispensable to the operation of the Branch. Information that might once have taken hours to retrieve and organize can now be compiled in a matter of seconds. Because much of the business that committees engage in requires tools that do not necessarily have a generalized application, the opportunity for users to design software 'in--house' suited to their very specific needs and reducing the reliance on third-party software developers, is very attractive. With a certain amount of obsessive determination (a character trait not uncommon among Clerks) and the ample available support material, it is relatively easy to develop some nifty and useful technological tools. The enthusiasm and curiosity inspired by these developments has led to a burgeoning list of future projects and a growing enlistment of the diverse talents held by our staff. Our initial reticence, and (some might say) curmudgeonly attitude, towards the possible usurpation of traditional methods by technology, has all but disappeared.