

CASE STUDY

EDMS Redesign Modernizes User Experience

● **INDUSTRY**
Government

● **COUNTRY**
USA



To continue providing the best possible service to the public, the [Louisiana Department of Environmental Quality \(LDEQ\)](#) decided to update its [Electronic Document Management System \(EDMS\)](#).

The outdated system, which had been in use since 2006, limited the public and staff's search capabilities and slowed the overall document retrieval process. So, LDEQ made the EDMS a mission-critical initiative, involving the public and its long-time partner [Access Sciences](#) to successfully complete it. Here's how:

A NEW, MISSION-CRITICAL INITIATIVE

In 2016, the LDEQ Undersecretary, Karen Andrews, hosted a meeting with the public, gaining valuable feedback that would spark the idea for an EDMS redesign.

ISSUE

LDEQ's 15-year-old EDMS was outdated, limiting search capabilities and preventing timely access to records for agency staff and the public

A Louisiana resident, who was also an employee of a large oil and gas company, asked a simple question – "Is there any way to make the EDMS more Google-like?" Even though that project would require a lot of funding and internal resources, Andrews aspired to move forward with the idea.

She sought advice from long-term partner Access Sciences, who has served as LDEQ's records management team since 2004. Although the firm advised steering away from the term "Google-like" due to technological and file limitations, they did express confidence in LDEQ's ability to modernize its document search and retrieval process.

SERVICES DELIVERED:

- Business Process Automation
- Records Center Operations
- Solution Architecture
- System Configuration & Implementation
- System Integration
- Training & Communications



Instead of a “Google-like” algorithm and search index, the new EDMS would be more “Amazon-like,” incorporating faceted-search which uses several levels of pre-determined filters to effectively find desired results.

To move forward, Access Sciences delivered a project proposal which received approval from LDEQ and funding in 2020.

MODERNIZING A CLASSIC EDMS

Staying true to its mission of providing exceptional service to the people of Louisiana, LDEQ involved its end-users – its staff and the public – from the beginning. A survey was sent out to identify which EDMS features were the most important, which narrowed it down to:

- Extremely fast search results
- Facet filters for search results
- Geolocation filters for search
- Increased search precision and recall

Access Sciences was tasked with building out the requirements and putting together a development team, which included five of the firm’s consultants as well as a contractor for UI/UX Design. Since the EDMS is a public-facing website, the team wanted to ensure a modern look and feel for end users.

Over the course of a year, the team built out the new EDMS according to business and technical requirements outlined by LDEQ, providing:

- A faster search experience
- Additional search capabilities
- The ability to save searches
- Email alerts for new documents that match saved searches
- A more modern, intuitive, and efficient design
- In-depth training videos
- A ticketing system to track comments, suggestions, and technical issues

In addition to fulfilling those requirements, the project team built out additional features, making the EDMS even more efficient and useful. For example, the system was designed to combine the internal and external document retrieval processes into one.

The team also improved the document submittal process for agency employees, making

SOLUTION

- ✓ LDEQ and Access Sciences redesigned the EDMS, modernizing the document search and retrieval experience
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it easier for them to track the status of their submitted document as it moved into each phase – in process, rejected, or in the EDMS.

Once LDEQ had its new EDMS built out, it was time to test it out.

There was an extensive, three-level user-acceptance testing process. The first level was the development team, the second level was the records management team and LDEQ project superusers, and the third level was EDMS staff and public users.

During testing, users identified additional capabilities that would further enhance the final product, and the team moved swiftly to incorporate those. For example, users thought highlighting search terms would make it easier to find the desired content in each document.

BENEFITS

- ☑ **Recognized as a leader in providing public access to government records**
- ☑ **Saved significant time for both internal & external users**
- ☑ **Enhanced government transparency**

So, the team added that functionality. Users also thought adding synonym search (for example, “street” and “st.”) should be incorporated, and the project team was able to include that in the system.

Like all of Access Sciences’ projects, change management for LDEQ’s new EDMS started at the beginning and continued throughout the entirety of the project (and beyond).

A monthly newsletter, [Discover DEQ](#), was sent out to staff and the public each month of development, detailing a new, soon-to-come EDMS feature.

And then, once the system was almost ready to roll out, the project team provided training support via quick, digestible [help videos](#) and fact sheets. The videos ultimately eased the transition for EDMS users and reduced the need for support from LDEQ staff.

ROLLING OUT A NEW & IMPROVED SYSTEM

After a full year of building, testing, and change management, LDEQ was ready to share its new system with the public.

The state agency [launched the system](#) in June 2021. Then, starting in July 2021, all users were automatically re-routed to the [new and improved EDMS](#). But they can still opt to use the “[Classic](#)” version. While the goal is to fully transition to the “Modern” version, LDEQ is giving users time to explore the new system and adjust first.

As with all of the firm's projects, Access Sciences continues to monitor the system and make improvements if needed. For instance - despite the extensive, multi-level testing process, the EDMS build-out missed a critical function.

After the rollout, agency employees found they could no longer print saved or incomplete submittals. This became a roadblock for some departments that needed to save, print, and route incomplete submittals to other departments.

As soon as that issue was identified, the project team immediately took action. They added that critical function into the system, fixing the issue within 24 hours.

"The new tool is definitely an upgrade, and I especially appreciate the new features in the Advanced Search engine." - Jeff Baker, Environmental Scientist Manager for LDEQ

"Some of the added functions I find useful are the expanded 'Advanced Search' and 'Report Bug' functions. I think our staff will really like the finished product, and it will allow them to be more productive and efficient in their daily activities. Great job by the EDMS Development Team." - Durwood Franklin, Sr. Environmental Scientist for LDEQ