

# CASE STUDY

## LaDOTD: First Agency to Onboard FileNet with the Office of Technology Services

 **INDUSTRY**  
Government

 **COUNTRY**  
USA



With its recent move to FileNet, the Louisiana Department of Transportation & Development (LaDOTD) became the first agency to integrate with the Office of Technology Services' initiative to standardize and streamline statewide access to technology, infrastructure, and governance. Part of this feat includes designating IBM FileNet as the state's approved electronic document management system.

After several upgrades to LaDOTD's current system, it became clear that the agency needed an entirely new system to gain the functionality needed for modern records management, making it the perfect opportunity to onboard IBM FileNet with OTS.

### SERVICES DELIVERED:

- Change Management Strategy & Planning
- Content Migration
- Implementation Support & Reinforcement
- System Configuration & Implementation
- Taxonomy Development
- Training & Communications

### ISSUE

LaDOTD's current content management system lacked the features and functionality needed to support best practices for modern records management

To help execute its move to IBM FileNet, LaDOTD engaged its long-term partner, Access Sciences. So, together all three parties worked collaboratively to onboard and migrate to the new system successfully. Here's how:

### **BUSINESS ANALYSIS & BUILDING TAXONOMY**

To develop a road map for the IBM FileNet implementation and migration, the project team first conducted interviews with different LaDOTD groups, gathering requirements and suggestions directly from end users.

Based on those initial conversations, it was clear that the new system needed improved document scanning/import management, improved classification scheme management, an advanced search and retrieval process, and more.



Along with the end users' wants and needs, the project team also acquired the information needed to start building out each group's taxonomy, metadata, and search templates.

## MIGRATING CONTENT & CREATING A USER-FRIENDLY SYSTEM

After a few roadblocks (a global pandemic and a major hurricane), the Access Sciences team developed a custom migration tool to make the content migration more efficient, saving the agency time and money since the original tool required additional licensing and custom fixes.

Once the project team finished migrating content to its new IBM FileNet repository, they decommissioned the old system and started to construct the user interface with IBM Content Navigator. The new site provided a modern, user-friendly UI experience with single sign-on and customizable desktop capabilities.

## TESTING & TRAINING

End user engagement ramped up during testing as the project team set up two ways to test out the new system. LaDOTD employees could assess the new system at their personal workstation at their own pace for a week, or they could visit a hands-on test location to try it out.

Training was also tailored to different employees' preferences. Some sessions were done virtually, some were done in small groups, and some accommodated larger groups. Despite the method, all training sessions were tailored to the attendees with search examples they would use regularly in their own operations.

## GO-LIVE & FEEDBACK

Overall, LaDOTD's new enterprise content management system was well-received by end users. The project team hosted an IBM FileNet Go-Live Kickoff Event, and more than 160 employees attended in-person.

The journey to IBM FileNet was a collaborative success for LaDOTD, OTS, and Access Sciences with:

- 4,760 LaDOTD users granted access to FileNet
- 4 million documents migrated from IBM Content Manager
- 98% data validation
- 118 DOCS forms in production

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## SOLUTION

- ☑ LaDOTD collaborated with OTS to implement IBM FileNet, making it the first agency to integrate with the state's IT standardization initiative
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- 468 FileNet training attendee
- 121 new taxonomies for item types
- 7 FileNet ICN servers supported for LaDOTD
- 5 Kofax and DOCS forms servers supported for LaDOTD

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## BENEFITS

- ☑ Gained a content management system with modern records management capabilities
- ☑ Achieved alignment with OTS' IT standardization initiative, preparing for future joint ventures
- ☑ Developed a roadmap and lessons learned for all future agencies embarking on similar projects

The agency not only gained a new, modernized system, but it also achieved alignment with OTS initiatives. Now, the project team's roadmap and lessons learned can provide insight for all future Louisiana agencies looking to onboard and migrate to their own new enterprise document management system.

*"The success of this project is truly a testament to the hard work of many teams and people, and I thank them all. I look forward to evaluating and implementing impactful enhancements to DOTD's FileNet solution and continuing to provide DOTD with a state-of-the-art electronic content and records management system for years to come." -- Brad Doucet, Director, Enterprise Support Services, LaDOTD*

