

# Shared Drive Reorganization and Use

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# Overview

- Identify issues and risks associated with ineffective use
- Identify potential benefits of shared drive reorganization and use
- Provide a project plan for shared drive reorganization and use



## Common Issues/Risks

- Lack of classification standard in creation of folders
- Reliance on individuals to provide timely access to records
- Inconsistent level of use
- Inability to identify significant or final versions
- Records filed in multiple locations



## Common Issues/Risks

- Ineffective use of security
- Lack of record ownership
- Non-compliance with legislative requirements for retention and disposition
- Inefficient use of employee time and network resources



# Benefits of Shared Drive Reorganization

- Secure, backed-up, central repository for corporate records
- Enhanced records retrieval
- Collaborative work environment for employees
- Access control to records
- Ability to manage retention and disposition
- Support for Electronic Document and Records Management System implementation (EDRMS)



# Project Initiation

- Define the shared drive reorganization as a project
- Project management vs. project deliverables
- Executive Support
- Objectives



# Project Planning

- Project Management Deliverables
  - Project Plan
  - Stakeholder Management
  - Communications
  - Metrics on information use



# Project Planning

- Project Deliverables
  - Business Rules
  - Classification Standard
  - Roles and Responsibilities
  - Implementation Plan
  - Change Management and Training
  - Operational Plan



# Project Planning: Business Rules

- Business rules govern the way users interact with the shared drive
- Aligned with project objectives, existing policies and procedures, industry standards
- Shared drive access
- Shared drive content
- Naming conventions
- Version control



# Project Planning: Business Rules

- Record level security vs. file system security
- User group creation and maintenance requirements
- Access requirements
- Record Integrity
- Change management
- Disposition process



# Project Planning: Classification Standard

- Analysis of existing resources including:
  - Existing shared drive folders
  - Email folders
  - Records retention and disposal schedules
  - Existing file classification plans/inventory
  - Annual reports/business plans
  - Website/Organizational charts
  - Directory of records
  - Project management office



# Project Planning: Classification Standard

- Identify approach to classification standard
  - Functional
  - Departmental
  - Subject
  - Hybrid
- Establish common document types including terminology and descriptions
- File codes



# Project Planning: Classification Standard

- Define a classification template that includes
  - Number of levels
  - Description or scope notes
  - Access requirements
  - Potential issues related to access
  - Retention and disposition requirements
  - Disposal authority
  - Branch or unit that generates the records
  - Contact person/role



# Project Planning: Classification Standard

- Manage expectations
- Develop classification standard
  - Involve users as required to ensure requirements are met and to build buy in
  - Be prepared to be flexible!
  - Complete template
  - Setup in test environment
  - Review and validate
  - Signoff



# Project Planning: Roles and Responsibilities

- Roles and Responsibilities aligned with existing information management program and business rules
- Project roles vs. operational roles
  - Users
  - Network Administrators
  - Branch coordinators
  - Management



# Project Planning: Implementation Plan

- How the implementation will occur has many dependencies
- Day forward or reclassification?
- Who will do what and when?
- Setup classification on new shared drive or within new folder on shared
- Cut vs. copy?



# Project Planning: Change Management/Training

- Phased approach to training and change management
  - IM/RM fundamentals
  - Record creation and collaboration
  - Roles and responsibilities
  - Implementation of new shared drive including the project deliverables and timeline
  - Post-implementation coaching
- Training deliverables
  - Initial training documentation
  - Job aids including quick reference cards, tips and tricks, indexes and cross reference tools



# Project Planning: Operational Plan

- Includes:
  - Roles and Responsibilities
  - Change management
  - Update of classification plan
  - Records retention and disposition schedules
  - Training and user support
  - User relocation and departure
  - Storage management



# Project Execution

- Complete implementation plan
- Ongoing monitoring of progress and update of project plan
- Communications
- Incentives



# Project Monitoring and Controlling

- Validate objectives
- Monitor ongoing use
- Ongoing support
- Identify and resolve issues
- Refine project deliverables including classification plan, business rules, implementation plan, etc.



# Project Closure

- Gather metrics
  - Network statistics
  - Plan for follow up on information use 3-4 months later
- Lessons learned
- Communicate success!
- Transfer to operations



# Questions

