Spring Cleaning your Shared Drive

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Your shared drive might be nearing capacity or you're having a hard time finding critical files. Maybe the cost of maintaining and storing so many digital documents is taking a chunk out of your bottom line. At FileFacets, we have helped clients that had not accessed 80% of stored data in years.

Whatever the reason, you have decided to clean the company's shared drive and you don't know where to start. Don't put it off just because the task might seem overwhelming.

To successfully cleanup your shared drive you need to follow a process which includes a number of steps, all in sequence – everything from planning your shared drive cleanup project, managing communications with content owners, and identifying a good pilot group. Without a plan, your shared drive won't stay organized after the cleaning.

Let's take a look at some basic steps behind a successful shared drive project.

Develop a SMART Business Case

Defining information governance by creating policies, procedures and rules for your shared drive cleanup is important. Align your shared drive cleanup with business processes. When you're coming up with a Folder Structure for your new shared drive, make sure that it complies with records management policies. Design a structure that is recognizable by business users. If your business calls budgets kazoos, don't change that terminology for the taxonomy, even though it makes no sense.

Creating retention schedules can become a complex, timely process. But you need to analyze each business unit to mirror business processes.

Classify your files by function, not project. Maintaining consistent categorization consistently throughout the project will increase the findability of files. ROT, which stands for Redundant, Obsolete, and Trivial files, is an incredibly important aspect of a shared drive cleanup because eliminating out of scope files reduces the size of your migration.

Implementing a Change Management Plan

Implementing a change management plan is one of the most important tips of our project-sequencing plan. The first element to the approach is garnering approval from upper management, since the project will have more likelihood of succeeding in the long run if this approval is forthcoming. Objections from above can squash a whole project, or even just make people feel uncomfortable using a system with known resistance from management.

Outline project benefits including the ROI of letting people find their files with greater ease, easier succession planning, risk mitigation, reducing storage costs, meeting regulatory requirements, and making your information system more competitive.

Train all users on the project at hand. Provide any user with access to your shared drive cleanup with a training session on your processes. Doing this before the cleanups begins so they are prepared. For obvious reasons, people will place higher priority on the project if they understand what it is going to do for them.

A key piece of this plan is communication. It cannot be stressed enough that communication it KEY! Users need to see themselves and their needs reflected in the information structure. Provide status updates, meeting reminders, and project completion notices.

Select Appropriate Pilot Groups

Be aware of what makes an unsuccessful pilot group. It may seem beneficial to choose a department with large amounts of records and multiple paths, but this could become a large mess if this is the first time records managers are implementing file rules, style guides, and disposition processing.

A bit of experience in content cleanup and migration will make your life easier when tackling complex units.

Select Effective SMEs

The next tip in our project-sequencing plan is choosing effective SMEs, subject matter experts. These are content users from each department or business groups that have both historical and corporate knowledge and will assist in the validation process. Constant corporate turnover or business restructuring can leave "orphan files" – without an owner or relevant subject.

SMEs know what information belongs to who, what files are most important, what files can be deleted, and what to do with historical documents. These SMEs are also aware of project goals and deadlines, and are also involved in the consistent communication between all project users.

Process ROT – A Quick Win

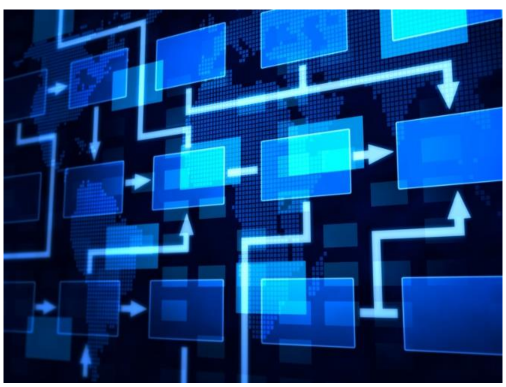
Now you are ready to organize your shared drive so that you can minimize migration size. ROT processing for your shared drive cleanup was established during the development of information governance and should be applied to each business unit.

FileFacets usually finds 40% of shared drive content can be removed to due ROT. This is incredibly beneficial as it reduces the volume of content in your new file repositories, reducing the time spent on mapping files to the new folder structure.

Map Content

Now you should map your shared drive content. Records managers or project users should follow records management practices throughout the content mapping process. Implementing your specific folder structure, you will transfer files from your old content repositories to your new file structure. This process can be done manually or with auto classification.

Run Disposition Processing



Once you have developed your retention schedule, it is time to apply those rules. There are two different ways that files can be removed during disposition: date modified or event triggered. The date modified method takes the date your file was last changed and sets a cut-off for removal. Event trigger disposition uses a specific date in time plus the file age, and applied this value to the file for removal. Once you have run your disposition, you are able to isolate records for disposal.

FileFacets does not delete any information, but rather sets ROT aside so you can make the final decisions on what should stay and what can go.

Prepare for Migration

After your content has been mapped and disposition is completed, it is time to prepare for migration. Migration has already been established within the original timeline and project scope but it is important to remind users of the events taking place.

Set shared drive to read only. This will prevent any errors during migration and protect any working content. You should also perform a full server backup before migration. Although this may seem obvious, a reminder to complete a backup can save endless amounts of stress and time saving for your files.

Finish Line: Migration

The final step in our project-sequencing plan is to migrate to your new shared drive. This entails migrating legacy content to the new information structure. It can be beneficial to run UAT, user acceptance testing, to validate the migration process before all content is officially moved to the new structure. Once you have completed the UAT you must apply security permissions as required and previously stablished in the project case.

Once your migration is complete don’t forget to inform all users! Make sure everyone is aware the project is finished and they can now use the new information structure in their day-to-day activities.