

Office Organized: The Records Management Show

Episode 2: The Electronic Epidemic

A few months ago we met Bob, who was suffering from a severe case of a disorganized office. The records management team performed an intervention, and put him on the right track. He had a couple of relapses, but now he can find everything he needs. He now goes around telling his co-workers to “get ARCed”.

Bob’s boss was so impressed with the transformation that he called a meeting with his staff and the records management team to find out if anything could be done to fix the division’s shared network drive.

“Just look at it!” exclaimed Gary, Bob’s Director. “It takes me half an hour to find anything that was saved onto the network.”

Claire, Bob’s co-worker, spoke up, laughing. “Yesterday Gary had three people standing over his shoulder helping him find a copy of last year’s work plan. You should have seen them fighting over control of the mouse!”

“We eventually found it,” Gary said, “but I can think of a better use of our time.”

Mary, the Records Coordinator, nodded her head. “I’ve seen this kind of thing before,” she said. “Let’s start by making a list of the problems.”



Typical Network Problems

The group made a list of the problems that they are having, in no particular order:

- Some people file everything on the shared drive. Other people file nothing on the shared drive.
- There is a mix of folders named after past and present employees, shared folders, and folders with weird acronyms that no one understands.
- Some documents have been on the network for years and no one knows what they are.
- Some older documents were saved in a file format that is no longer used.
- Confidential information has been saved on the network.

- Multiple copies of the same document are saved in different locations on the network.
- Document names are not meaningful. You have to open the document to find out what is about.

Shared Drive Solution

“The answer to all of this is very simple,” said Mary, “You need rules. And, you need to follow them.”

Everyone groaned.

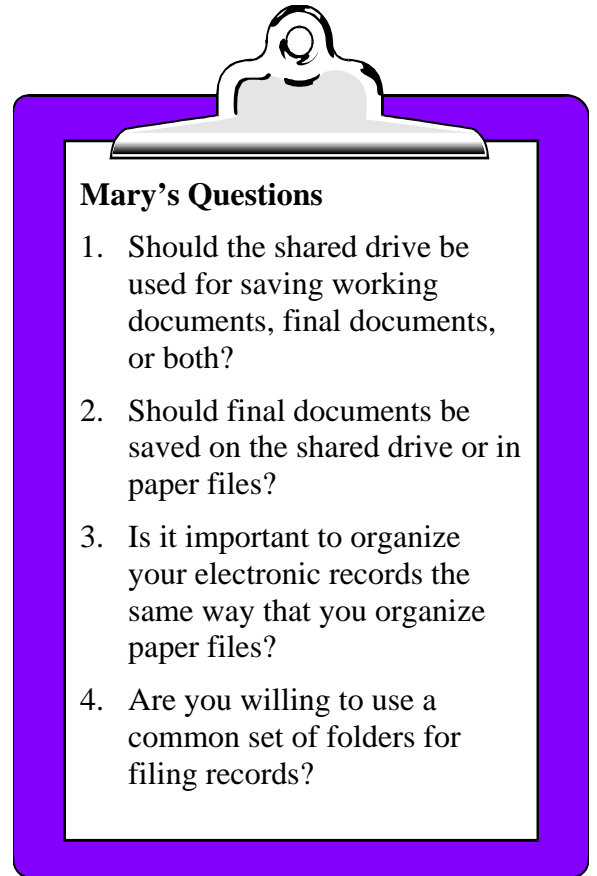
“No, really. This problem is not going to solve itself. You need to agree on what kinds of records should be saved on the network, when they should be saved, where they should be saved, and how they should be saved. That means rules.”

Mary handed out a sheet of paper to everyone. “These questions will help you set up the rules for your shared drive.”

Setting the Rules

The group worked through each of Mary’s questions. They agreed on the following rules:

1. The shared drive should be used to save final documents. Working documents should be saved on the shared drive if co-workers need access to them.
2. Most of the group preferred to use electronic records rather than look up a paper file. After reviewing their records, they realized that most of their records could be kept electronically. They decided to keep their final documents on the shared drive. They would still keep two series of records in paper because their legislation requires them to keep the original signatures. Bob and Clare will re-write their program procedures to explain where each type of document should be kept.
3. Everyone agreed that the paper system worked well, and that it would be better if the shared drive were organized the same way. Brian, the Administrative Assistant, was given the job of re-organizing the shared drive so that it matches their ARCS and ORCS files. Brian will go over the changes at next week’s staff meeting.
4. Brian will review the shared drive at the end of each fiscal year, and identify records that can be disposed of according to ARCS and ORCS. He and Mary will work with Public Works and Services to get approval to delete the records from the network.



Mary's Questions

1. Should the shared drive be used for saving working documents, final documents, or both?
2. Should final documents be saved on the shared drive or in paper files?
3. Is it important to organize your electronic records the same way that you organize paper files?
4. Are you willing to use a common set of folders for filing records?

For more information, contact your department’s records coordinator, or contact the Records Management Unit at 920-3009 or 873-7446