

## Onit Migrates Network Drive; Provides Governance, User Training, and Change Management

### Issue:

For 20 years Onit's client, a division of a large public sector public utility, had used a shared network drive without governance. With no file management protocols, standardized folder architecture, or consistent naming conventions, the drive had evolved into an anarchic collection of files and folders housing terabytes worth of data, which users struggled to navigate and which hindered productivity. The vast majority of data had no clear owner, with files "lost" when staff moved on. Faced with a pending platform change, the division was charged with cleaning up its network drive and coming into compliance with Records Management policy.

### Strategy:

Onit's deliverables were a current state analysis, plus file folder architecture, naming conventions, and migration strategy and support.

Onit quickly realized that importance of user involvement in the new system design and the migration itself. They also recognized that a recent reorganization was an opportunity for the new file system to support leaders' vision around new work practices, rather than just reflecting the org chart. Thus the strategy was to guide team leaders in building a new architecture around information flow and helping users mitigate their own data, including bringing their files into archiving compliance.

### Solution:

Onit formed a stakeholder group representing each team as well as IT, Records Management, and division leadership. This group mapped information flow, as well as business requirements. Onit then guided the creation of a new file structure based on this information flow, along with naming conventions and a governance plan mapped to business needs and processes.

Onit also created an engagement plan and supporting materials to provide users information on the new system and to encourage participation in the migration. Engagement included a steady cadence of updates during the system development process, a user migration process, short videos about the system and the migration process, "cheat sheets", and a detailed user manual. A SharePoint site was developed to provide on-demand training materials for the initial migration and for ongoing maintenance and policy compliance.

The migration process included identifying files outside the utility's archiving policies and marking these for deletion, as well as archiving all relevant records per policy. As part of the training users were also taught simple monthly and annual routines to ensure the system remained in compliance.

Onit also assisted users in the migration process, providing 1:1 and small group training, capturing user questions to feed into FAQ resources, and authoring a project newsletter.

### Results:

New file architecture supported business needs. 75 users were trained in the new file system and in City archiving and file retention policies. 270GB+ of data was earmarked for deletion, 200GB of data was earmarked for archiving, and 150,000+ files were migrated into the new system. Governance and training materials were put in place for ongoing management.