

- Step 1** **Make a project plan.**
- Step 2** **Design the basic structure and establish business rules.**
- Step 3** **Create the new folder structure.**
- Step 4** **Clean up the existing LAN.**
- Step 5** **Transfer documents from the old LAN to the new structure.**
- Step 6** **Close down the old LAN or folder structure.**

1

Make a project plan that includes:

- Timelines for the project (Steps 2-6)
- Liaison with IT
- Reports and software
- Communication plan
- Staff training plan

Who?

- You
- Manager(s)
- IT

Completion goal:

You need:

A list of LANs, and the measurement of each high level folder.

- GB
- Folders
- Files (Documents)

2

Design the basic structure.

- A brand new LAN?
- Classification system model
- What to do with files that have reached Final Disposition

Establish business rules for configuration and permissions.

- Rules for open and restricted folders

Who?

- You
- Manager(s)
- IT
Reports
Software
Timelines

Completion goal:

3

Create the new structure.

- Plan it out.
- Nail down permissions.
- An Excel matrix can be converted to folders.

Who?

Completion goal:

4

Clean up existing LAN.

Duplication
Drafts
Personal documents
PSTs
Executables
Shorten long filepaths

Who?

Completion goal:

Reports (TreesizePro)

Communication 1

What we're going to do.

Training

What can be removed?

What must be kept?

FOLDER	Jan 1	Feb 1	March 1	April 1
M:\ Photos	17 GB	14 GB	11 GB	
	480 folders	400 folders	350 folders	
	9,121 files	7,000 files	5,500 files	
M:\ iTunes	22 GB	11 GB	9 GB	
	141 folders	100 folders	85 folders	
	441 files	222 files	100 files	
M:\				

5

Migrate documents from the old LAN to the new structure.

Who?

Completion goal:

Communication 2

What we're doing.

Training

How to classify.

How to use the retention schedule.

How to migrate.

6

Close down the old LAN or folder structure.

Who?

Completion goal:

Communication 3

What we did.