



METRO **N** **Y** **C** CHAPTER

# ARMA@Noon

- Data Mapping:  
Know and Manage  
Your Information

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# Before we begin....

- Who knows what a data map is?
- Who knows what purpose it serves?
- Whose organization has a data mapping document?
- Who in this room has access to that document?
- That's why we are here today – to help you be able to manage your information

# What Is a Data Mapping Document?

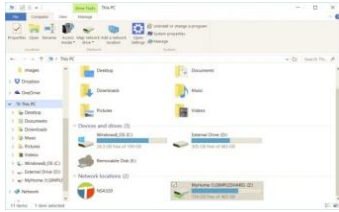
- A data mapping identifies certain metadata:
  - Where your data is (repositories)
  - What type of information a repository contains (e.g., documents, images, structured database elements)
  - Where records and “special information” reside
  - Who owns it
  - Who accesses it

# Why is a Data Map Important?

- RM – need to know where records reside
- IT – need to know what systems the organization has
- Legal – need to know locations of data (eDiscovery need)
- Legal – need to know where confidential information is (e.g., IP)
- Privacy – need to track PII, PHI and other privacy data

# Where is Your Data: Known Repositories

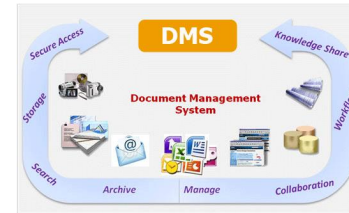
- Known and obvious



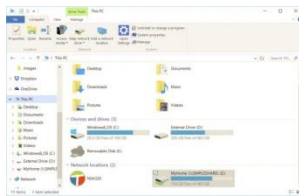
Network drives - known



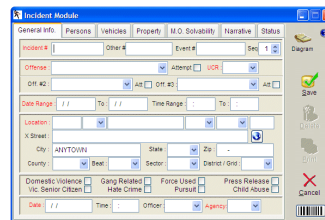
SP



DMS



eMail



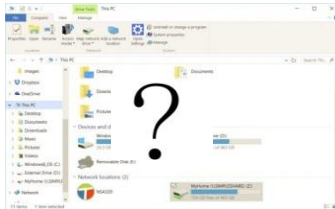
RMS



CMS

# Where is Your Data: Other Repositories

- Not so obvious



Network drives - unknown



Images/docs not on server or connected to appropriate database



Legacy systems

# What do you know....

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## QUICK ANALYSIS of REPOSITORIES

Put a checkmark in each box where you think you know the answer.

| Data                     |         |               |          |                         |                          | Repository   |
|--------------------------|---------|---------------|----------|-------------------------|--------------------------|--|
| Business Unit (BU) Owner | BU Uses | BU only Views | IT Owner | Contains "Special Info" | Type: doc, db, images... |  |
|                          |         |               |          |                         |                          | Case Management System (CMS)                               |
|                          |         |               |          |                         |                          | Document Management System/s (DMS) (other than SharePoint) |
|                          |         |               |          |                         |                          | SharePoint   |
|                          |         |               |          |                         |                          | Records Management System (RMS)                            |
|                          |         |               |          |                         |                          | Network drives – known owner                               |
|                          |         |               |          |                         |                          | Legacy systems – still on network, not in use              |
|                          |         |               |          |                         |                          | Documents not connected to a valid server                  |
| ---                      | ---     | ---           | ---      | ---                     | ---                      | Other Repositories (not listed above):                     |
|                          |         |               |          |                         |                          |  |
|                          |         |               |          |                         |                          |  |
|                          |         |               |          |                         |                          |  |
|                          |         |               |          |                         |                          |  |
|                          |         |               |          |                         |                          |  |



# Know the Data

- Who OWNS the data ?
- Who USES the data?
- Who VIEWS the data?
- Who in IT is responsible for the data system?
- Does the data contain “special” information?



# Step 1

## 1. IT is your new BFF

- What documentation already exists?
- What information is in the documentation?
- Does it cover ALL systems?
- How can you improve on that documentation?

# Step 2

## 2. Interview Business Units

- Identify repositories
- Prepare initial inventory chart
  - How do they refer to the repository (what do they call it)?
  - What type of data do they put in the repository?
  - Who else (what other departments, if any) also accesses the repository?
  - What is the frequency of use?
  - Who is the IT contact for issues?
- Add to (or update) data mapping document

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## Sample Initial Inventory Form

| ITEM                                       | Example                            | Response |
|--|------------------------------------|----------|
| System/Application information             |                                    |          |
| Formal System/Application Name             | FT-RMS                             |          |
| Also known as name(s) (what users call it) | Records system; <u>FileTracker</u> |          |
| Brief Description                          | RM database                        |          |
| Server Name                                | Pluto2                             |          |
| Server location                            | NY, NY                             |          |
| Storage size                               | 300 TB                             |          |
| Back up methods                            | tape                               |          |
| Receives data from:                        | HR employee system                 |          |
| Sends data to:                             | Case Management System             |          |
| Data Information                           |                                    |          |
| Type of Information                        | Docs, images                       |          |
| Format of information                      | MS office, tiff                    |          |
| Contain records?                           | Yes / No                           |          |
| "Special information"?                     | PII, PHI, IP                       |          |
| Users and Frequency                        |                                    |          |
| Data Owner                                 | Records Dept, daily                |          |
| Users (adds/edits)                         | HR, daily                          |          |
| Users (views only)                         | All employees as needed            |          |
| Additional Information:                    |                                    |          |
|  |                                    |          |

# Step 3

## 3. Document the Business Unit Workflow

- For each system, indicate:
  - Who are the primary users (“adds” data)
  - Who “edits” the data
  - Who “views” the data
  - Responsible IT personnel
    - System maintenance
    - System backup/restore
- Add to (or update) data mapping document

# Step 4

## 4. Document the Data Workflow

- For each system, indicate:
  - Other systems that feed data into it
  - Other systems that it sends data to
- Add to (or update) data mapping document

# Document What You Have

- Where it is
- Who is responsible for it
- Who accesses it
- What data it contains
- Identify “special information” repositories

# Start Simple

- Remember the 80/20 Rule
- Tackle the first 20 or so repositories
- Use Excel to start
- Grow to a database later
- Start with a pilot group and revise form as needed

# THANK YOU

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