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
- SharePoint (SP)
- Document Management System (DMS)
- eMail
- Rights Management System (RMS)
- Content Management System (CMS)
Where is Your Data: Other Repositories

- Not so obvious

Network drives - unknown

Lost Connection To Server
Disconnected: ORIGIN error retrieving player data from storage - code 503.

Images/docs not on server or connected to appropriate database

Legacy systems
What do you know....

### QUICK ANALYSIS of REPOSITORIES

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

<table>
<thead>
<tr>
<th>Data</th>
<th>Repository</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit (BU) Owner</td>
<td>Case Management System (CMS)</td>
</tr>
<tr>
<td>BU Uses</td>
<td>Document Management System(s) (DMS) (other than SharePoint)</td>
</tr>
<tr>
<td>BU only Views</td>
<td>SharePoint</td>
</tr>
<tr>
<td>IT Owner</td>
<td>Records Management System (RMS)</td>
</tr>
<tr>
<td>Contains “Special Info”</td>
<td>Network drives – known owner</td>
</tr>
<tr>
<td></td>
<td>Legacy systems – still on network, not in use</td>
</tr>
<tr>
<td></td>
<td>Documents not connected to a valid server</td>
</tr>
<tr>
<td></td>
<td>Other Repositories (not listed above):</td>
</tr>
</tbody>
</table>
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
# Sample Initial Inventory Form

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

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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