

Taxonomy – A Brief Overview

Common Definitions

- ▶ **Taxonomy:** Classification and organization of information.
- ▶ **Record:** Any information recorded on a tangible medium and intentionally retained and managed as evidence of an organization's activities, events, or transactions for business, legal, regulatory, and/or historical purposes. (Taken from Information Nation by Randy Kahn)
- ▶ **Metadata:** Data about data.



Common Definitions

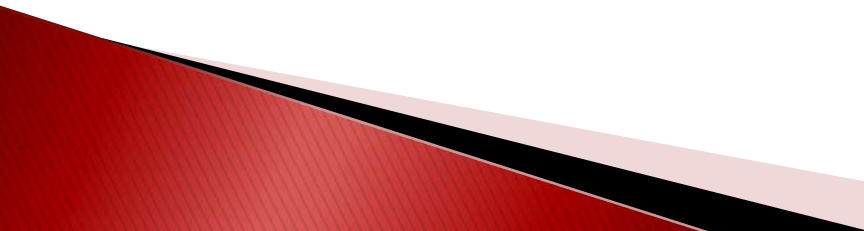
- ▶ **Record Lifecycle:** Stages that all records go through from creation to destruction.
 - Creation – Record is created using a software application.
 - Active/Working – Record is being worked on by one or many people.
 - Cut Off – Trigger for record to become read-only.
 - Retention – Record is read-only and is being kept per legal requirements.
 - Disposition – Record is destroyed or moved to off-site location.



Common Definitions

- ▶ **Electronic Document Management System (EDMS):** A software program that manages the creation, storage and control of documents electronically. The primary function of an EDMS is to manage electronic information within an organization workflow. (taken from www.edms.net)
 - A basic EDMS should include document management, workflow, text retrieval, and imaging.
 - An EDMS must be capable of providing secure access, maintaining the context, and executing disposition instructions for all records in the system.
- ▶ Olmsted County's EDMS is Laserfiche.

How can taxonomy, metadata & Laserfiche help me?

- Defining of standard naming principles.
 - Ease of searching for your document.
 - Reduction of duplicate files.
 - One record in the system.
 - Ability to find and destroy records when they have met their retention.
 - Ability to route documents with alerts to necessary staff as needed.
 - Simplifies any necessary legal defense.
 - Ability to allow public access. (future enhancement)
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Storage Options at Olmsted

	SharePoint						Laserfiche	Exchange	Server			
	My Sites within SharePoint (if approved)	Team/Project Sites within SharePoint	OlmConnect within SharePoint	Departmental Team Portal within SharePoint	OlmNet within SharePoint	Olmsted County Internet	Laserfiche OC-Enterprise	Individual Email Inbox	Applications	Home Drive (S:)	Department Shared Drive (K:)	Local Hard Drive (C:)
Active documents	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓
Historical documents	✓				✓	✓	✓		✓	✓	✓	✓
Metadata	✓	✓	✓	✓	✓	✓	✓					
Versioning	✓	✓	✓	✓	✓	✓	✓					
Search ability	✓	✓	✓	✓	✓	✓	✓					
Records Management	✓	✓	✓	✓	✓	✓	✓	✓				
Who can store data	[1]	[2]	[3]	[4]	[7]	[7]	[5]	[1]	[8]	[1]	[4]	[1]
Who can view data	[1]	[2]	[3]	[4]	[5]	[6]	[5]	[1]	[8]	[1]	[4]	[1]

[1] Employee Only

[2] Team Members (internal staff only)

[3] Team Members (internal & external staff)

[4] Department Employees

[5] All County Employees

[6] General Public

[7] Web Editors

[8] Application Specific Employees

Steps to move us forward

1. Organizing your electronic files
2. Implement a standard naming convention
3. Where to store your records that makes the most sense

Human Resources Taxonomy

The image shows a software window titled "Preview Template" with a red title bar. Inside the window, there is a form for "HR - Employee Data Documents". The form contains the following fields:

- Template:** A dropdown menu showing "HR - Employee Data Documents".
- Employee ID:** A text input field with a right-pointing arrow button.
- Doc Type - HR Employee File Category:** A dropdown menu.
- Last Name:** A text input field with a right-pointing arrow button.
- First Name:** A text input field with a right-pointing arrow button.
- Middle Name:** A text input field with a right-pointing arrow button.
- SSN - Employee:** A text input field containing "--" with a right-pointing arrow button.
- Date:** A date input field with slashes and a calendar icon, followed by a right-pointing arrow button.
- Sunset Date:** A date input field with slashes and a calendar icon, followed by a right-pointing arrow button.
- Separation Date:** A date input field with slashes, colons, and a calendar icon, followed by a right-pointing arrow button.

A "Close" button is located at the bottom right of the window.



Personnel File Folders

Action Forms
Administrative Committee Approval
Applications and Resumes
Background Check
Benefits
Civil Service
Claims
Deductions
Deferred Comp/MSRS/PERA
Emergency Contacts
Evaluations
HR CDL Drug and Alcohol Program
I-9 Forms
Leaves
Medical Files
Misc. Correspondence
Name Authorization
OSHA Medical Exams
Psychological Evaluations
PTO, Vacation and Sick
Sheriff Drug and Alcohol Random Program
Tuition Reimbursement
W-2 Forms
W-4 Forms
Worker's Compensation

Document Input Sheet

HR Employee Documentation Cover Sheet

SINGLE EMPLOYEE COVER

Date  **Sunset Date** 

* 4-digit for year required * 4-digit for year required

Print or Store Print Store to Laserfiche

Scan Package Type * One Employee - One Document Type Multiple Employees - One Document Type

Employee ID


Last Name

First Name

Middle Name

Document Type *

<input checked="" type="radio"/> Action Forms	<input type="radio"/> Leaves
<input type="radio"/> Administrative Committee Approval	<input type="radio"/> Material Safety Data Sheets
<input type="radio"/> Applications and Resumes	<input type="radio"/> Medical Files
<input type="radio"/> Background Check	<input type="radio"/> Misc. Correspondence
<input type="radio"/> Benefits	<input type="radio"/> Name Authorization
<input type="radio"/> Civil Service	<input type="radio"/> OSHA Medical Exams
<input type="radio"/> Claims	<input type="radio"/> Psychological Evaluations
<input type="radio"/> Deductions	<input type="radio"/> PTO, Vacation and Sick
<input type="radio"/> Deferred Comp/MSRS/PERA	<input type="radio"/> Sheriff Drug And Alcohol Random Program
<input type="radio"/> Emergency Contacts	<input type="radio"/> Time Sheets
<input type="radio"/> Evaluations	<input type="radio"/> Tuition Reimbursement
<input type="radio"/> HR CDL Drug and Alcohol Program	<input type="radio"/> W-2 Forms
<input type="radio"/> HR OSHA 200 & 300 Logs	<input type="radio"/> W-4 Forms
<input type="radio"/> HR Payroll Taxes	<input type="radio"/> Worker's Compensation
<input type="radio"/> I-9 Forms	

 ACTION FORMS

File Upload Or drag files here

Questions?

