

SUBJECT: Approval of contract extension of contract no. 20-093P, Content Manager Electronic Records Implementation to extend the completion time to June 30, 2022.

AGENDA OF: June 15, 2021

ASSEMBLY ACTION:

approved under the consent agenda. 6/15/21 KBJ

MANAGER RECOMMENDATION: Present to the Assembly for consideration.

APPROVED BY MIKE BROWN, BOROUGH MANAGER: *MB*

Route To:	Department/Individual	Initials	Remarks
	Originator	<i>ent for</i>	
	Purchasing Officer	<i>[Signature]</i>	
	Finance Director	<i>[Signature]</i>	
	Borough Attorney	<i>[Signature]</i>	
	Borough Clerk	<i>MB</i>	<i>6/2/21 KBJ</i>

ATTACHMENT(S): Fiscal Note: Yes _____ No X
Revised Scope of Work *(17 pp)*

SUMMARY STATEMENT: On March 3, 2020, the Assembly authorized the award of contract no. 20-093P, Content Manager Electronic Records Implementation boroughwide.

The project was delayed due to the COVID-19 restrictions.

The Clerk's department therefore requests approval of this contract extension now that COVID-19 travel restrictions are lifted, and borough employees are back to work to complete the project. The revised scope of work is attached.

In accordance with MSB 3.08.170(B), Administration requests authority to modify the resulting contract completion date by 30 days for unforeseen circumstances.

RECOMMENDATION OF ADMINISTRATION: Approval of contract extension to Contract No. 20-093P, Content Manager Electronic Records Implementation, to June 30, 2022.

IMPLEMENT CONTENT MANAGER FOR MANAGING ELECTRONIC RECORDS

BACKGROUND

In March of 2000, the Borough started a change management project for managing electronic records in Content Manager instead of on the network drives. Due to the COVID pandemic, the project was cancelled prior to completion. The planning and development phases of the project are mostly complete. The Borough would like to finalize the planning and development phase and focus on implementation and training.

SCOPE OF WORK

The objectives of this project are to provide a repeatable Change Management Plan to implement Content Manager for 36 divisions with up to 50 Records Coordinators and up to 300 End Users. This will result in Borough employees managing their electronic records for the life cycle of the records in Content Manager instead of using the network drives. The process is to include:

- A business analysis interview including a review of our current network environment to provide solutions on how users can move to CM for their daily work of records.
- Workshops with record coordinators developing folders and subfolders in CM to help our user's transition from the network drives to CM.
- Training for record coordinators and end users.

We would like to utilize the materials provided in the appendices as the basis for the analysis and training components of this project.

DELIVERABLES:

1. Provide a written change management plan that includes an entire repeatable implementation process to use Content Manager instead of Network drives for managing electronic records for 36 divisions within the MSB, to include at least, but not limited to, the following elements for each division.
 - a. Kick Off Session
 - i. Introduction
 - ii. Provide a Demo of CM
 - iii. Provide a timeline and expectation for the project
 - iv. Q&A
 - b. Business Process Analysis Interview
 - i. Analysis should review network drives to identify which records need to have folders established in CM
 - ii. Analysis should identify any circumstance that may require another solution other than CM.
 - iii. This will include gathering information regarding paper records in order to help the transition to electronic.
 - iv. See Appendix C. (We want to work with the business analyst to further develop.)

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- c. Post Interview Analysis
 - i. This is a meeting to include the MSB Records Team and Information Business Analyst; purpose is to identify needs noted during the interview
 - ii. See Appendix D.
- d. Record Coordinator Training (6 hours of hands-on training for each session)
 - i. 50 Record Coordinators
 - ii. See curriculum outlined in Appendix B. (We want to work with the trainer to further develop.)
- e. Workshops with the Record Coordinators and Key Users in each division, based on Business Process Interview and Post-Interview Analysis. Up to a 3-hour workshops for each division to:
 - i. Build folders and subfolders in CM
 - ii. Create Saved Searches and set up Shortcuts
 - iii. Identify any follow-up needs
 - iv. Participants include Records Team, Business Analyst, Division Record Coordinators and Key Users.
- f. Follow-up
- g. End User Training (a total of 4 hours of hands-on training for each session)
 - i. 300 End Users (beginners)
 - ii. See curriculum outlined in Appendix B. (We want to work with the trainer to further develop.)
- h. Close Out Sessions
 - i. A 30-minute close-out session will be conducted with each division within to review progress and wrap up the project. During this session, the Post Interview Analysis Action Log will be reviewed with staff, outlining the issues encountered and their resolutions, and the status of any outstanding items, including any recommended actions. Participants include Department Director, Division Manager, Record Coordinators and Key Users, and the MSB Records Team.
 - ii. Lessons Learned with Implementation Team
 - 1. To learn what went well and what did not go well

Please provide us a table of deliverables including your phases and time frame.

- 1. Provide a Transition Policy from network drives to Content Manager.
 - a. Not to exceed 20 hours
- 2. Provide a guideline to delete non-records from the network drives.
 - a. Not to exceed 20 hours

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GOALS

1. Employees will use Content Manager for their daily work instead of using the network drives.

END RESULT

1. Successful transition from using Network Drives to using Content Manager for managing electronic records for 36 divisions.
2. 50 Record Coordinators trained as Records Managers in Content Manager.
3. 300 End Users trained as Knowledge Workers in Content Manager.
4. Folder Foundation built for 36 divisions so users can manage electronic documents in Content Manager.
5. Saved Searches created and Shortcuts are set up.
6. List of exceptions where records may not be suited for Content Manager.
7. Policy for moving off the network drives.
8. Guide for deleting non-records off network drives.

ORGANIZATION

Project Management:

MSB Records Management Officer will serve as the Project Manager to represent MSB interests and to manage the over-all project with the following responsibilities:

- Reports to and receives direction from the Borough Clerk.
- Participates in and reviews and approves project plan and deliverables.
- Assists with managing, reviewing, and prioritizing the project work plans with objective to stay on time and on budget.
- Assists with management of the project resources.
- Collaborates with project teams members.
- Communicates and collaborates with the project manager of the selected vendor.
- Meets with project team to regularly review issue and monitor progress.
- Conducts risk management analysis.
- Provides weekly updates.

The proposer is expected to have their own internal PM to coordinate with and supply status information to the MSB PM.

SPECIAL REQUIREMENTS

Remote work and training is preferred; remote access is available through remote connectivity.

TECHNICAL SPECIFICATIONS

The MSB will provide access to all networks required for completion of the engagement. A training room with laptop and remote accessibility is available at the main MSB DSJ Administration building for up to 10 people at a time.

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SCHEDULE

Work will begin upon issuance of the contract and will continue through project completion. The borough hopes to have the project completed by July 2022. We will not be available to work on the project between our election season, which is mid-October through mid-November.

MINIMUM REQUIREMENTS

1. Services must be provided by staff having at least 5 years' experience with Content Manager (previously known as TRIM); with proven experience implementing electronic records for government agencies.
2. Business Process Analysis and workshops should be performed by a Business Analyst.
3. Training should be performed by a trainer with Content Manager training experience.
4. Must provide 2 government agency references for successful implementations of electronic records in Content Manager (previously known as TRIM).
5. Record Coordinator Training will be 6-hour sessions and End User training will be 4-hour sessions. All training sessions will be hands-on, allocated to guiding the users through key tasks based on the approved curriculum, as they participate on training laptops.
6. Prior to delivering training to any users, the proposer will present a complete demo/delivery of the Record Coordinator and End User trainings to the Records Team for review and feedback.

Functional Requirements

1. Please see Questions section below.
2. Proof of concept demonstrations with live data from the MSB network are welcomed but not required.

DISCLAIMER

The Borough shall have unrestricted rights to all delivered data, reports and documentation. All data, reports and documents will be delivered electronically in Microsoft Office format that can be edited.

MSB TEAM

Joell Church, Records Management Officer, Project Manager
Elaine Flagg, Records Management Specialist
Jordan Ortolano, Records Management Assistant
Harish Krishnamoorthy, IT Programmer
Lonnie McKechnie, Borough Clerk

QUESTIONS

1. Please provide a list of the staff, their activities/task, qualifications, experience and references.
2. Are any of your project managers Certified Project Management Professionals and Federal Records Management?
3. How much experience does your Business Analysis have in implementing electronic records?
4. Please summarize your model approach for this project including the change management plan, business process analyses, workshops, training and enterprise implementation plan.
5. How much time do you expect to complete the planning and development phase?
6. How much time do you expect to complete the analysis and design phase?
7. How much time do you expect to complete the training phase?
8. What do you need and expect from the Records Team for each phase?

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THIS SCOPE OF SERVICE DOES NOT INCLUDE:

1. Implementation and Training for End Users within the DES department and divisions.
2. Rollout of Content Manager as a new product. (We have been using CM since 2000; it is already deployed to the users for paper management.)
 - a. Any set up of profiles will be done by MSB Records Staff.
3. Setup and Configuration of Content Manager for Record Types, User Profiles, Classification Plan, Retention Schedules, Locations, Permissions, Security and Access Controls.
 - a. If areas of improvement are identified, the MSB Team will make the updates in Content Manager.
4. Moving the current content from the network drives, unless done during training or work sessions.
5. Migrating information from Business System Applications.
6. Does not include the paper based system, except as mentioned in the Business Process Analysis Interview for informational purposes only.
7. Does not include email integration functionalities.
8. Does not include Technical Architecture Review.

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Appendix A: Organizational Chart

<u>Department</u>	<u>Division</u>	<u>Record Coordinator</u>
<u>Administration</u>	<u>Admin</u>	<u>Mary Miller</u>
	<u>Public Affairs</u>	<u>Mary Miller</u>
	<u>Human Resources</u>	<u>Tammy Parkhurst, Taylor Buettner</u>
	<u>Port</u>	<u>Tiffany Richards</u>
	<u>Animal Care & Regulation</u>	<u>Tiffany Richards</u>
	<u>Purchasing</u>	<u>Hollie McRae</u>
<u>Law</u>	<u>Admin</u>	<u>Linda Vinson</u>
	<u>Attorneys</u>	<u>Kelly Beatriz</u>
<u>Clerks</u>	<u>Admin</u>	<u>Melissa Iverson, Deb Wetherhorn</u>
	<u>Elections</u>	<u>Jordan Ortolano</u>
<u>Planning</u>	<u>Admin</u>	<u>Karol Riese</u>
	<u>Planning Division</u>	<u>Leda Borys</u>
	<u>Platting</u>	<u>Sloan VonGunten</u>
	<u>Development Services</u>	<u>Theresa Tarranto, Michelle Olsen, Jennifer Monnin</u>
<u>Finance</u>	<u>Admin</u>	<u>Layla Lesley</u>
	<u>Accounting</u>	<u>Kathleen Kelly</u>
	<u>Accounts Payable</u>	<u>Cheyenne Chandler</u>
	<u>Revenue & Budget</u>	<u>Nikki Hyson, Ruth Pechota, Amy Jacobs</u>
	<u>Collections</u>	<u>?</u>
	<u>Assessments</u>	<u>Alice Hawkes</u>
	<u>Assessments Records</u>	<u>Krista King</u>
	<u>Appraisers</u>	<u>Alice Hawkes</u>
<u>Public Works</u>	<u>Admin</u>	<u>Jennifer Ballinger</u>
	<u>O&M</u>	<u>?</u>
	<u>Solid Waste</u>	<u>Chelsea Westerberg, Kierstyn Hollibaugh</u>
	<u>Project Management</u>	<u>Iris West</u>
	<u>Pre Design & Engineering</u>	<u>Cindy Corey, Debbie Bakic</u>
	<u>Road Maintenance</u>	<u>?</u>
	<u>Facility Maintenance</u>	<u>?</u>
<u>IT</u>	<u>IT Admin</u>	<u>Brooke Loudon</u>
	<u>Operations Division</u>	<u>Brooke Loudon</u>
	<u>GIS Division</u>	<u>Marie Cobb</u>
<u>Community Development</u>	<u>Admin</u>	<u>Jill Irsik</u>
	<u>Land & Resource Management</u>	<u>Jill Irsik</u>
	<u>Recreational Services</u>	<u>Alyssia Jones</u>
	<u>Parks & Outdoor Rec</u>	<u>?</u>

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Appendix B: Example of Training Curriculum:

Below is a training outline we have developed from our training manual. We would like to work with the proposer to enhance this outline for the record coordinators and the end users.

Connect to the Dataset

1. Connecting to Dataset – Walk them through the process of accessing the Training (cmapptst) for this training, or Production Dataset for future use (cmap01)
 - a. File Options
 - b. Discuss how to set their integration for MS Applications

CM Interface

1. Ribbon Toolbar
 - a. Point out the different Ribbons available
 - b. Matsu Ribbon has most of the tool icons you will need
 - c. Usage of ribbon toolbars is similar to MicroSoft applications
2. List Pane
 - a. Demonstrate how to customize the list pane and that it is similar to Excel
 - b. Demonstrate adjustments to column width, dragging columns left or right, adding and removing columns
3. View Pane
 - a. Brief explanation of the following tabs:
 - i. Properties
 - ii. Notes
 - iii. Preview (for electronic documents)
 - iv. Previous (if applicable)
 - v. Renditions (we don't use this tab at MSB)

Shortcuts

Describe and demonstrate how to use Shortcuts (Remind them Shortcuts are quick links and will be used to find frequently used records).

1. **Favorites:**
 - a. Save Documents to **Favorite Records**
 - b. Save Classifications to **Favorites Classifications**
 - c. Save Saved Searches to **Favorites Searches**
2. **Recent:**
 - a. Recent Documents
 - b. Recent Containers
3. **Trays:**
 - a. Work Trays – Describe and demonstrate how they can use it
 - b. Documents Checked Out – Demonstrate and ask them to check this every night, make sure all documents are checked back in before they leave for the night.
 - c. User Labels

Record Types

1. Electronic Folders
2. Subfolders
3. Documents

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Create Folders and Subfolders:

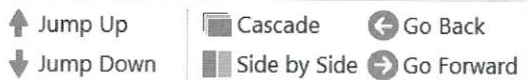
1. Create a few Folders
 - a. Talk about the Naming Convention at the Folder Level and how it inherits down to the subfolder and documents.
 - b. Save Folders to Favorite Records F-4 and right-click/Send To Favorites
2. Create some Subfolders
 - a. Save Subfolders to Favorite Records F-4 and right-click/Send To Favorites
3. Show them how to edit Properties (metadata) fields on Folders; then have them do it on the following fields:
 - a. Title
 - b. Date closed
 - c. Notes
 - d. Additional Fields

Navigating Record Types and Windows

1. Show them what a file Structure in CM looks like, ie:

Record Number	Title	Owner	Disposition
ADM-3-1-433	ADM - Admin Files - Complaints - Closed 2020	Administration	Active
ADM-3-1-430	ADM - Admin Files - Port - Active	Administration	Active
ADM-3-1-431	ADM - Admin Files - Port - Closed - 2020	Administration	Inactive
HUM-15-1-1	ADM - Administration - Disciplinary Actions - 2020	Administration	Active
GEN-11-33-522	ADM - Correspondence - 2020	Administration	Active
ADM-3-6-64	ADM - Delegation of Authority - 2020	Administration	Active
ADM-3-7-119	ADM - Lobbyist - 2020	Administration	Active
ADM-3-17-66	ADM - Manager's Report - 2020	Administration	Active
GEN-11-2-101	ADM - Non Records - 2020	Administration	Active
GEN-11-24-9	ADM - Presentations - 2020	Administration	Active
ADM-3-16-199	ADM - Public Records Request - 2020	Administration	Active
GEN-11-23-2673	ADM - Reference	Administration	Active
GEN-11-44-10	ADM - Templates	Administration	Active
GEN-11-17-27	ADM - Working - Shared - 2020	Administration	Active

2. Demonstrate basic navigation methods from a sample file structure:
 - a. How to use the + sign to expand a folder or subfolder to access its contents.
 - a) How to navigate from document to subfolder to folder using the jump up icon on the MatSu Records Ribbon; or in the reverse using the jump down icon
 - b) How to use the right-click menu to navigate to container records, or to contents, as an alternative to jump up/jump down icons.
 - c) Demonstrate the go back and forward tool icons as well.



- d) These navigation icons (jump up/down and go back/forward) are available on both the MatSuRecords Ribbon and the Search Ribbon.
- e) Sorting within columns

Creating Documents in Content Manager:

1. Drag and Drop – NEW – Move a document from desktop/network with Drag-Drop.
2. Move more than one document from desktop/network with Drag-Drop.
3. Move a document from desktop/network with Check-In/integration. *SEND TO
4. Move more than one document from desktop/network with check-in.
5. Move an email from Outlook with Drag-Drop.
6. Move more than one email from Outlook with Drag-Drop.

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7. Move an email from Outlook with Check-In/integration.
8. Move more than one email from Outlook with Check-In/integration.
9. Micro Soft Office (MSO) – (WORD/Excel/PPT) - Save a new/active document from MS Application with Content Manager Integration tab
 - a. Remind them that CM is not just for inactive/closed documents; it works very well for new and active records also.
10. MSO - Save As a new/active document from MS Application
11. View a document in Content Manager

Managing Documents in Content Manager:

1. Edit documents:
 - a. Open and edit an existing Word Document in Content Manager several times
 - b. Show them the revisions
 - c. Show them promote revisions
 - d. Finalize some documents
 - e. Save As a final document to another folder (mimics the template process)
 - f. Move a document from one folder to another
 - g. Edit a Folder's and Subfolder's metadata
 - i. Title
 - ii. Date Closed
 - iii. Notes
 - h. Edit the document's metadata
 - i. Title
 - ii. Container
 - iii. Enclosed
 - iv. Verified
 - v. Date Declared as Final
2. Email Attachment
 - a. Demonstrate how to send an electronic document to an email recipient Internal or External
 - b. Demonstrate how to rename the attached document as shown in the email.

Recycle Bin and Yearly Non-Records Folder

1. Recycle Bin is used for empty containers no longer needed (Folders and Subfolders).
2. Show them how to move a folder into the Recycle Bin and apply a Delete Reason.
3. Non-Records Folder is used for non-record documents only, such as drafts and copies.
 - a. Each division's Record Coordinator creates a Non-Records folder at the beginning of each year for the staff in that division to use for non-records no longer needed.
 - b. Demonstrate how to move a document into a Non-Record Folder.
4. Have them practice hands-on training.

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Searching

1. Quick Find Search Bar – Discuss and Demonstrate (Use drop-down menu only; not the blue quick-select folder. We want to keep it simple.)
 - a. Selection from Dropdown menu
 - b. Freetype entry
 - c. Search For Records:
 - i. Search By Record Number; Matching Criteria = D-20-70210
 - ii. Search By Date Registered; Matching Criteria = Today; Last Week; manual-entered date or date-range
 - iii. Search By Any Word; Matching Criteria = Highway
 - iv. Search By Owner; Matching Criteria = Division Name
2. Simple Searches – Discuss and Demonstrate (ICON – Mag Glass (Mention CTRL-F))
 - a. Search For Records:
 - i. Drop down;
 - ii. Freetype;
 - iii. Search By Any Word;
 - iv. Search By Date Closed;
 - v. Search By Creator;
 - b. Refine a Search and discuss/demonstrate how to use the following tabs:
 - i. Search Tab
 - ii. Filters Tab
 - iii. Record Types
 - iv. Do not discuss the remaining tabs.
3. USING Saved Searches – Discuss and demonstrate what they are and how to use them
 - a. Access Saved Searches from the Saved Searches icon on the MatSu Records Ribbon (also located on the Search Ribbon).
 - b. Demonstrate how to save a Search to Favorites. Use “My Division’s Active Electronic Folders” as example.
 - c. Run “My Division’s Active Electronic Folders”.
4. Using Classifications to Locate Records – Discuss and Demonstrate
 - a. Use Classifications icon on MatSu Records Ribbon or Search Ribbon to display records using that classification. (Right-Click/Show Records).
 - b. Refine the classification results; show a few basic examples.
 - c. Save a Classification to Favorite Classifications; show them how to access Favorite Classifications on their Shortcuts Bar.
 - d. Remind them they can use their Favorite Records, Favorite Classifications and Favorite Saved Searches to locate their daily work and/or most frequently used items.

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Appendix C: Business Process Analysis Interview

This is a draft of the types of questions we would like to ask, we would like to develop these further with the selected proposer's business analysts and to provide a streamlined solution in CM.

Name: _____

Division _____

1. What paper records do you currently maintain?
2. What are your most frequently accessed paper folders?
3. Do you share these folders with other staff or divisions?
4. Do you convert paper records into electronic or scan them into the network or a system applications?
5. Are any of your paper folders parted out (case files, project files, contracts)?
6. What types of electronic documents do you create? (Case Files, Purchase Orders, Correspondence, Project Files, etc.)?
7. Where are your documents stored? (i.e., CM, Network Drives, Sharepoint?)
8. Are any documents stored in software applications (i.e., Logos, Govern, NovaTime, etc.)? Which documents (i.e., backup info, reference files, reports, etc.)?
9. Do other divisions need to access your documents? If so, Who? Which records?

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10. What records are confidential?

11. What are the 5 folders do you access most frequently on the network drives?

12. How do you find your documents on the Network?

13. Fill in the blank: If the network were to become read-only, I would need a place in Content Manager to store _____. (What documents?)

14. Do you have any:

a. Reference documents? Yes/No If so, where are they stored?

b. Working documents? Yes/No If so, where are they stored?

c. Templates? Yes/No If so, where are they stored?

15. Do you have any documents that you think may need to stay on the network?

16. Do you have concerns about using Content Manager for any specific documents or processes?

17. What works well on the Network Drives?

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18. What does NOT work well on the Network Drives?

19. Is there anything standing in your way from moving your documents into CM instead of storing them on the Network Drives?

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Appendix D: Example of Post Interview Analysis Action Log

We would like to develop these further with the selected proposer's business analyst.

Department/Division Name: _____

This draft log is intended to capture the division's needs throughout the implementation process, to include user pain points; changes needed to Classification or Retention schedules; record categories not yet represented in CM; changes needed to permissions or security/access; training needed beyond the standard curriculum; business processes that need more attention; etc. (Bolded items are those that are routinely addressed with every division.)

Item No.	Issues and Pain Points	Recommendation	Contact point/Actions Taken/Follow-up Notes	Resolved?
1	Paper records to be managed electronically.			
2	File share review: Any new Classifications needed?			
3	Folders needed in CM for Templates (GEN-11-44) and Reference Files (GEN-11-23)?			
4	Other active records that need new folders in CM?			
5	Any records that need autopopulating subfolders?			
6	Security/Access working well for any shared records?			
7	Any Processes Shared w/ Other Divisions that need to be worked out?			
8	Naming Convention Review; any recommendations?			
9	New Saved Searches Needed for Anyone?			
10	User Labels Needed for any Individuals?			
11				

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Appendix E: Glossary of Terms

CM Implementation: A repeatable, sequential process with the goal of establishing competency all of all users in managing their records in Content Manager. This process is made up of the following components, completed in the following sequence for each division.

1. **Kickoff Session:** Brief meeting (30 minutes or less) with the staff within each division to inform them of what to expect in the upcoming implementation. Basis is a brief Introduction presentation and a quick demo of Content Manager provided by the Proposer and to answer any questions staff may have.
2. **Business Process Analysis Interview:** A meeting between the Proposer's Business Analysts, Record Coordinators and key users within a division for the purpose of identifying division records, file structure needs, classifications, and business process needs. The interview is based on a questionnaire created by the Proposer and MSB Records Staff (See Appendix C for example.)
3. **Post-Interview Analysis Session:** Conducted for each division by the implementation leaders (MSB Records Team and Proposer Business Analysis Staff) to review, document and plan for issues identified during the interview process. These meetings will not typically include division staff. This session either initiates the Post-Interview Analysis Action Log for each division if it was not initiated during the interview itself, and or continues to develop it.
4. **Workshop:** Workshop conducted by Proposer's Business Analyst staff with participation from the Record Coordinator and any Key Users for the following purposes: 1) Review content of network drives to identify any records that need folders established in CM; 2) Assist Record Coordinators and key users in setting up the needed folders in CM; 3) Assist Record Coordinators and key users in establishing a streamlined work environment (assist in identifying the best way to access/create their records and setting up Favorites/Shortcuts, User Labels, and Saved Searches accordingly; 4) Address any issues identified in earlier stages of this implementation.
5. **Record Coordinator Training:** Standard training provided to Record Coordinators and Key Users according to the curriculum approved by MSB Records Team.
6. **End User Training:** Standard training provided to remaining staff (End Users) according to the curriculum approved by MSB Records Team.
7. **Closeout:** 30-minute close-out session conducted with each division to outline the division's progress in Content Manager and to wrap up the project. During this session, the Post-Interview Analysis Action Log will be reviewed with staff, outlining the issues and resolutions encountered and the status of any outstanding items, including any recommended actions. All new policies will be delivered to the division. Participants may include Division Manager, Record Coordinators and Key Users and the MSB Records Team.

Department/Division: The department is the parent group of a division.

Post-Interview Analysis Action Log: Tool used by implementation leaders to document and track issues and actions for each division throughout the entire implementation processes, from Interviews through Closeout. (See Appendix D; Documents the following: a) User "pain points"; b) Specific training needs not included in the standard curriculum; c) any record categories not currently represented in MSB's classification plan; d) any record categories that need folders established in Content Manager; e) any changes needed to existing classifications or retention schedules; f) any issues identified with Security/Access, i.e., changes needed to group membership, default permissions on a classification, etc.; g) any business processes shared with other MSB divisions which may need to be addressed outside of

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this project; h) any other issues or needs discovered during the implementation. This log has also has garnered strong “buy-in” when reviewed with the division at Closeout.

Key User: Any employee designated by the department director or division manager to be included in the division interview, Record Coordinator training, and business process analysis.