

- We shouldn't make any major changes to the current file management system
  - SharePoint and the N Drive both have unique, important features, and neither should be discontinued
    - The speed of the N Drive is very important and is one of its most popular features
      - U2: Really likes the speed of the N Drive; it's good for large files
      - S: 'N Drive has excellent read/write speed – very important'
      - S: People who prefer the N Drive cite its speed and ease of use as its main positives
    - The ability to collaborate on files is vital
      - S: People who prefer SharePoint like it because of its capabilities for collaboration
      - S: SharePoint is 'better suited for collaboration'
      - G: The ability to collaborate with third parties outside of GLC is very important to the work on Blue Accounting
    - SharePoint and the N Drive serve different purposes
      - U4: The biggest question is how to determine which Blue Accounting materials should go on SharePoint vs. the N Drive
      - U5: Most of the work on Blue Accounting is done on SharePoint
      - S: Over half of employees use SharePoint as well as the N Drive
      - S: There is a roughly even split between employees who prefer the N drive, those who prefer SharePoint, and those with no preference
      - G: There is little overlap in content between SharePoint and the N Drive
      - G: Blue Accounting materials are split between SharePoint and the N Drive
      - G: Some folder/filenames on SharePoint and the N Drive are similar enough to cause potential confusion about whether they are the same or different

- We should try to capitalize on similarities in work needs and styles to increase standardization in key areas while minimizing the loss of freedoms
  - People overall tend to express more positive feelings about the system with the N Drive than SharePoint
    - Most people are very happy with the N Drive
      - U2: 'No major pain points' with the N Drive; emphasized many times throughout the interview that they really like it
      - U3: Is a 'big fan' of the N Drive
      - U3: Prefers the N Drive to cloud storage
      - U5: No major complaints about the N Drive
      - S: Employees report overall high levels of satisfaction with the N Drive
      - S: Many employees praise the N Drive's flexibility and ease of use
    - Many people find SharePoint slow and hard to use
      - U2: SharePoint is way too slow and disorganized
      - U3: Doesn't like having to 'wait 10 minutes just to open a PowerPoint' on SharePoint
      - U5: Hadn't used SharePoint prior to being brought on to Blue Accounting, and finds it hard to navigate and understand access privileges
      - U5: Wouldn't want to switch to SharePoint only
      - S: SharePoint is 'too slow and cumbersome'
      - S: 'SharePoint is slow, convoluted, and... not easily navigable'
  - People like having freedom in how they work and organize their files, and limiting the freedom they have now would not go over well
    - It is important to maintain people's freedoms
      - U1: Wants to keep the freedom to organize their files how they like
      - U3: There is no protocol for naming files and they 'wouldn't follow it if there was'
      - U3: 'We shouldn't be too rigid and try to force everyone to be the same'
      - U3: Seemed like they would be very resistant to adding any major new protocols or increasing standardization
      - U4: Doesn't want to micromanage their teams too much
      - U5: Likes having autonomy over how they organize their files
      - S: Many employees don't want to lose the freedom to arrange their files how they like
      - S: The 'freedom to manage our own project files' on the N drive is a big plus
    - Most people would be resistant to sudden major changes
      - U1: 'Everyone is used to where things are now'
      - U2: Doesn't want any major changes
      - U3: Sounded very positive about the way the N Drive is now and didn't seem open to major changes

- U3: Everyone has their own way of doing things and we shouldn't force changes
- S: 'I do not want a web browser-oriented system'

○ Certain factors in how people work are the same for everyone, and it could be helpful to look for commonalities

▪ There are certain constants with how everyone uses folders on the N Drive

- U1: Partitions their projects using folders on the N Drive
- U3: Every project has to have its own folders due to having different funding sources
- U3: Every one of their project folders has an 'Admin' folder; other folders will depend on the needs of the project
- U4: All projects have an 'Administration' folder
- U4: There should be a basic standard structure for project folders (like with an 'Admin' folder, etc.) that can be customized to suit each individual project
- U5: For every project, the funding documents, progress/final reports, and any products should always be kept, but we probably don't need all the minor meeting notes, etc.
- G: The 'Program Development' folder is for planning potential/proposed projects, and they get moved to the 'Projects' folder when they receive funding

▪ A general library of frequently used assets could be beneficial

- U1: It could be helpful to determine the most commonly used generic GLC documents on the N Drive and store them all in one easily accessible location
- U4: Would like to have a central image library where all images are stored so that they will be more easily searchable
- U4: Would like to create standard GLC slides for presentations at conferences and other outside events and have them stored in a central library
- S: A majority of employees would find a shared image library useful, but some have reservations about it (especially regarding image usage rights)

▪ Folders should be structured so that everyone can understand them

- U4: There is no one right way to organize a folder but it should be intuitive
- U4: Everyone on a project team should know where everything is in that project's folder
- S: Some employees want there to be a clearer way to organize folders
- S: The most common complaints about the N Drive are inconsistency with naming conventions and folder structure and clutter due to old/duplicate files

- Naming conventions and individual folder layouts should not be our primary concern
  - Because everyone organizes their things differently, people can get confused when looking in others' folders
    - People all have different personal folder structures
      - U1: Runs the 'Advocacy' folder and 'wouldn't want anyone to mess with it'
      - U2: Keeps all their stuff in a personal folder under 'Communications'
      - U2: Keeps their folder well-labeled and only moves things around if it will create a better hierarchy
      - U2: Has to maintain a strict folder structure and be very careful when moving things due to how Adobe file formats are saved
      - U4: Used to use a 'macro' document to keep track of where everything was in subfolders
      - U5: People all organize their files differently
      - U5: Sometimes restructures their folder and deletes old, empty subfolders
      - U5: Keeps their own version of the 'Program Development' folder in their personal directory with a shortcut to it in the official folder
    - Naming conventions are inconsistent and can cause some confusion
      - U2: Recommends that other people label their stuff better so they can find it on their own
      - U4: Too many acronyms in filenames can get confusing
      - U4: There doesn't need to be a fixed standard for filenames but they should be clear and intuitive
      - U5: Uses a lot of acronyms in their filenames; it's easy for their team to understand but maybe not for outsiders
      - U5: Doesn't use a consistent format for dates in filenames
      - S: 'Inconsistency with file naming' is an issue on the N Drive
      - G: There are lots of overly long/complex filenames on the N Drive
      - G: There is little consistency with naming conventions on the N Drive or between it and SharePoint
    - Everyone knows where their own stuff is but finds other people's folders confusing
      - U1: Can find it hard getting brought on to projects that are already underway and having to learn how the information is organized
      - U3: Never has trouble finding their own files but might have trouble in folders owned by others
      - U3: Has trouble finding things if they are brought on to a project mid-way and there is no set file structure
      - U4: 'Everyone generally knows where their own stuff is'
      - U4: If they can't find someone else's file they just ask the owner, it's only a problem if they can't find it either or they're unavailable

- U5: Has no problem finding their own stuff but other people's directories aren't as intuitive
- U5: Can have trouble finding things in other people's folders, might have to call them and ask but can usually find what they need with their help
- S: It can be 'challenging to navigate the folders I don't use often' on the N Drive

○ Despite minor setbacks, people rarely have any real issues with finding what they need on the N Drive

▪ People not having permissions to access something they need is never a big problem, and it's a good system

- U2: Can't always save something to the folder it belongs in, just asks Marty for access when it happens, it's never a big problem
- U3: It's not a problem if team members don't have the access they need, they just ask Marty
- U3: Likes being able to limit who has access to what
- U4: Wouldn't want everyone to have access to everything, it's good to be able to control who can see what
- U5: Sometimes they can't save to a folder because they don't have access so they have to send it to someone who can

▪ If people can't find something on their own, they can usually find it another way

- U2: People often ask them to find their stuff for them, it's only a problem if they don't give enough info to search on
- U4: Sometimes they don't know where to look for something on the N Drive so they find it on the GLC website instead
- S: Most employees get asked by colleagues to find things for them, but many say it's not frequent

▪ Overall, people don't have much trouble finding things on the N Drive

- U2: It's generally easy to find old materials unless they're pre-computer (might not be scanned in, or might have been given a name that's not meaningful)
- U2: Never struggles with finding things or using the N Drive
- S: A majority of employees don't report significant trouble with finding things on the N Drive
- S: Only a minority of employees say they spend too much time searching for things on the N Drive

- We should try to create more opportunities for people to clean up their files
  - Old/duplicate files pile up due to the lack of protocols for dealing with them
    - There are lots of duplicate files
      - U1: Sometimes they keep multiple copies of the same document in different locations, and would like to keep a record of changes made to it or have all copies update when any copy is edited
      - U3: There aren't any size issues with the N Drive yet but there are 'probably lots of duplicate files'
      - U4: People can't always tell which draft is the right version of a document when they go back and revisit it after it was finished
      - U5: Sometimes there is duplication of files
      - G: There are so many old drafts of documents on the N Drive
      - G: There are lots of redundant/empty/duplicate folders on the N Drive
    - There is lots of old stuff taking up space on the N Drive
      - U1: Agrees there is probably too much data being stored on the N Drive
      - U3: Too much old stuff people don't need is being kept on the N Drive
      - S: A majority of employees agree there is too much old stuff cluttering the N Drive, although a minority strongly disagrees
      - S: 'Old/dated files... clutter space' on the N Drive
    - The N Drive has gotten cluttered with loose files
      - U4: The 'Projects' folder use to be organized based around GLC's 7 program areas but it doesn't fit that anymore and should be organized better
      - U4: Sometimes you get a 'square peg in a round hole' and people don't know what folder a document belongs in or it doesn't really fit anywhere, so they just leave it 'wherever'
      - U4: What should we do with things that don't fit into any particular folder?
      - U5: Everyone is supposed to use the main 'Program Development' folder but it's too crowded and busy and they don't like it so they have their own version
      - G: The N Drive is very messy with lots of loose/orphaned files
      - G: Many folders on both the N Drive and SharePoint are empty and/or haven't been touched in years
    - There is no system in place for dealing with old drafts, and everyone does it differently
      - U2: Marks final drafts with 'Final' and sometimes puts them in a separate folder
      - U3: Has an 'Old' folder for keeping old drafts in case they are ever needed
      - G: The N Drive has various 'Archive' or 'Old Drafts' subfolders in certain directories but they aren't always used
      - G: SharePoint has an 'Archive' folder that actually gets used

- We should avoid deleting old files (with some exceptions) but we don't need to keep them on the N Drive
  - People don't think it's necessary to keep every old draft
    - U1: It's not necessary to keep old drafts after finalizing a document
    - U2: Keeps a few recent old drafts as backups but deletes them as they become outdated
    - U3: Wouldn't choose to keep '30 slightly different versions of a document', just does it because everyone else here does
  - Anything could be important in the future, so nothing should be deleted
    - U1: Usually just leaves old files where they are after finishing projects, there's no way to know what could be important later on
    - U4: Is conservative about deleting things, you 'don't know what will be important in 20 years'
    - G: We are not supposed to delete old files
  - Old materials don't need to be immediately accessible as long as they're still around
    - U3: Wants a place to keep old materials out of the way
    - U3: We could move materials from completed projects to the P Drive, they don't need to be immediately accessible
    - U3: Old stuff could be kept in cloud storage or on another drive as long as it's still accessible
    - U5: Archives their old files on a personal hard drive
- People want and try to take better care of their files, but lack the structure to effectively do so
  - Many people have loose, informal naming conventions they use
    - U1: There are no formal naming conventions but makes sure titles always have the document type, topic, date, and draft status
    - U2: Always uses a year-month-day date format in titles to make them easily searchable/sortable
    - U5: Always makes sure to include project name, document type, and date in each filename
  - People want to be neater with their files but don't have time to take care of them
    - U1: Occasionally goes back to delete duplicate files after finishing projects
    - U4: Cleaning up after finishing projects is a 'perennial issue'; it's 'not really anyone's job' so people usually just forget and move on to the next thing
    - U5: Likes to try to keep things clean
    - U5: Tries to go back and delete old stuff once a document is finished
    - U5: Likes to archive projects over 5 years old but tends to get behind
    - U5: Says too much data is being kept on the N Drive but everyone is too busy to keep things cleaner

- G: There is no official policy for archiving old materials
- People would generally be open to certain smaller changes
  - U1: Would like a protocol for archiving inactive materials
  - U1: Wants a better protocol for keeping track of working and final drafts
  - U3: Would support stricter rules about archiving old things
  - S: A vast majority of employees would support the implementation of new protocols for archiving old materials
  - S: A large majority of employees are open to more protocols for file naming and organization, but there are some who don't want to change their ways