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.
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)
## Storage Options at Olmsted

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<thead>
<tr>
<th></th>
<th>SharePoint</th>
<th>Laserfiche</th>
<th>Exchange</th>
<th>Server</th>
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<tbody>
<tr>
<td><strong>Active documents</strong></td>
<td>✓</td>
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<tr>
<td><strong>Historical documents</strong></td>
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<tr>
<td><strong>Metadata</strong></td>
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<td><strong>Versioning</strong></td>
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<td><strong>Search ability</strong></td>
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<td><strong>Records Management</strong></td>
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[1] Employee Only
[2] Team Members (internal staff only)
[3] Team Members (internal & external staff)
[4] Department Employees
[5] All County Employees
[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

[Image of a software interface with fields for employee data such as Employee ID, Last Name, First Name, Middle Name, SSN, Date, Sunset Date, and Separation Date.]
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
Questions?