



Shared Drive Cleanups – Things to Think about

A Records Management Session



Presenters

Records Management Office

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Acknowledgements

Dalhousie University operates in the unceded territories of the Mi'kmaw, Wolastoqey, and Peskotomuhkati Peoples. These sovereign nations hold inherent rights as the original peoples of these lands, and we each carry collective obligations under the Peace and Friendship Treaties. Section 35 of the Constitution Act, 1982 recognizes and affirms Aboriginal and Treaty rights in Canada.

We recognize that African Nova Scotians are a distinct people whose histories, legacies and contributions have enriched that part of Mi'kma'ki known as Nova Scotia for over 400 years.





STEPS



**THINGS TO THINK
ABOUT**



**IDENTIFYING
NEEDS**



Before You Begin

Support -

- YOU HAVE IT (Records Management Office)
- YOU NEED TO GET IT (Senior Leadership)

Expectations -

- TIME, TIME & MORE TIME
- Determine who is going to do the work
- Many hands make light work





Phases

Phase 1 – Approval, Initial Communications, and Measuring a Starting Point

Phase 2 - Identifying the unit's administrative business activities

Phase 3 - Identify access levels

Phase 4 - Initial review of NAS folders

Phase 5 - Create a structure

Phase 6 - Naming conventions

Phase 7 - Moving and identifying records for disposition

Phase 8 - Continuing maintenance

***Note:** The order of the Phases is a guide.*

PHASE 1

APPROVAL, INITIAL COMMUNICATIONS, AND MEASURING A STARTING POINT

1. Secure the approval and support of your unit's senior leadership.
2. Contact ITS for a reports
 - Storage size, folders names and sub folder, access and access rights
3. Allocation of responsibility
4. Secure a commitment and contact name from each group involved
5. Realize this will take time

Communication point

Communication point



PHASE 2

IDENTIFYING THE UNIT'S ADMINISTRATIVE BUSINESS ACTIVITIES

Use DalCLASS to identify:

- The administrative business activities of your unit
- Whether your unit is a primary or secondary office
- How long your unit is required to keep records
- Records vs Not Records

***TIP:** The Records Management Office can assist in facilitating this process.*

***Check-in:** NAS report – Request a new report to check on clean-up status or progression. Compare to the initial one (from Phase 1).*

Communication point



PHASE 3

IDENTIFY ACCESS LEVELS

Reviewing current user groups access vs how that will be structured in the new repository is key

- Consider this when determining how folders will be structured for appropriate user access.

Break down access required per folder

There will be crossovers.

- Depending access rights these may be different access groups.

Create a spreadsheet or use the User Groupings spreadsheet template



PHASE 4

INITIAL REVIEW OF FOLDERS

Now we get into the content in the folders

Strategize an approach & *Communication point*

***TIP:** Book a session with the RMO on identifying records & non-records.*



PHASE 4 con.

INITIAL REVIEW OF FOLDERS

Use this opportunity to encourage staff to:

- Delete empty folders
- Delete duplicates and transitory documents
- Note documents in unrecognized formats (How old is the document? Do you need a program to open it?)



Communication point
Training point

PHASE 5

CREATE A STRUCTURE

Here the new folder structure will start to take shape.

Start applying user groups to folders

Set up meeting with contacts outlined in Phase 1

- Discuss roles and expectations
- Review User Access Groups
- Review NAS folder(s)
- Set parameters for identifying records; duplicate records; transitory records; and indeterminate records ('not sure').
- Educate NAS users about duplicate and transitory records and encourage their deletion when identified

Communication point



PHASE 6

NAMING CONVENTIONS

File names and paths should be:

- Meaningful
- Relevant and brief — no more than 255
- Consider - moving this to SharePoint?

Benefits to a defined naming convention:

- Creates clarity and consistency for records
- Reduces 'mood based' naming
- Quickens searchability of documents
- Reduces duplication
- Simplifies reading and sorting in folders

Consider how the unit currently names and searches
(discuss with contact)

Document!



PHASE 7

MOVING AND IDENTIFYING RECORDS FOR DISPOSITION

Create a Test Folder Structure

Grant Read only Access to Stakeholders as you progress though

Don't rename inactive records > move to folders:

- Ready for Deletion
- Ready for Transfer to the Archives

Once identified these are going to go through the records management disposition process



Communication point

PHASE 8

CONTINUING MAINTENANCE – *NEW REPOSITORY*

Allocate Responsibility & Expectations of:

- Unit commitment
- Senior leadership
- NAS administrative leader(s)
- All unit employees

Document processes

Create a cheat sheet for:

- DaICLASS numbers and retentions
- Naming Conventions
- Acronyms

Create schedules/Check ins

Monitor - Regular reports from ITS

Communication point

Organization isn't about
perfection

it's about efficiency,
reducing stress and
clutter, saving time
and money and

improving

your overall quality of life.

– Christina Scalise

PHASE 8b

MAINTENANCE - OF OLD REPOSITORY

- Meet with RMO to look at what DalCLASS records are left in the old repository
- RMO can help start with the paperwork to authorize the dispositions (deletion vs transfer to the University Archives)



Remember!!!





[Digitizing Records - Things you should think about](#)

[Departure of Employees](#)

[Email Best Practices](#)

[How long do I keep this stuff? DalCLASS can help with that!](#)

[Naming Conventions](#)

[Records management: what is it and how can it help me?](#)

[Sending Admin Records to their Final Destination](#)

Sessions







THANK YOU

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