SHARED DRIVE CLEAN-UP – WHERE DO I START?

Records Management Session



Facilitated by:

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OVERVIEW



STEPS



THINGS TO THINK ABOUT



IDENTIFYING NEEDS

BEFORE YOU BEGIN

Support -

- YOU HAVE IT (RMO)
- YOU NEED TO GET IT (SENIOR LEADERS)

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



PHASE 1

APPROVAL, INITIAL COMMUNICATIONS, AND MEASURING A STARTING POINT

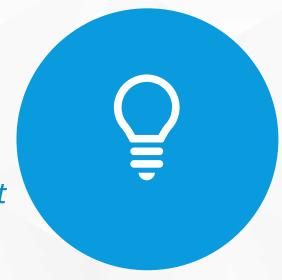
- 1. Secure the approval and support of your unit's senior leadership.
- 2. Contact ITS for a reports
 - Storage size, folders manes and sub folder, access and access rights
- 3. Allocation of responsibility

Communication point

4. Secure a commitment and contact name from each group involved

Communication point

5. Realize this will take time



PHASE 2 IDENTIFYING THE UNIT'S ADMINISTRATIVE BUSINESS ACTIVITIES

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

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

User groups access is set two folder levels deep.

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

Break down access required per folder

There will be cross overs.

Depending access rights these may be different access groups.

Create a spreadsheet or use the User Groupings spreadsheet template

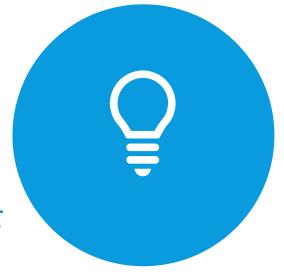


PHASE 4 INITIAL REVIEW OF FOLDERS

Use this opportunity 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



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

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 out lined 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').
- Encourage deletion of empty folders
- 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

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

Allocate Responsibility Expectations of:

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

Document processes

Create a cheat sheet for:

- DalCLASS 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

easyorganizedhome.com

your overall quality of life.

- Christina Scalise

REMEMBER!!!



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