

SHARED DRIVE CLEAN-UP – WHERE DO I START?

Records Management Session



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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
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

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 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').
- 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!

Communication point



PHASE 7

MOVING AND IDENTIFYING RECORDS FOR DISPOSITION

Create a Test Folder Structure

Grant Read only Access to Stakeholders as you progress through

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:

- 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

REMEMBER!!!



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