SHARED DRIVE CLEAN-UP – WHERE DO I START?

Records Management Session

Facilitated by:
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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
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
1. Secure the approval and support of your unit’s senior leadership.

2. Contact ITS for reports:
   - Storage size, folder names and sub folders, 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

PHASE 1
APPROVAL, INITIAL COMMUNICATIONS, AND MEASURING A STARTING 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
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
- Quickeens searchability of documents
- Reduces duplication
- Simplifies reading and sorting in folders

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

"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!!!

WE ARE HERE TO HELP
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