Case Study: Shared Network Drive Clean-up Project

Tim Nolan
Texas Water Development Board
Background

- The Message: Shared Drive is full
- The Response: Records Management can help
- The Audit: Recommendation – get control of shared drives, need policy
- Shared drive was not organized in anyway
- Metadata was incomplete or incorrect
- Ownership difficult to determine
The Policy

- Roles and Responsibilities
  - Authorized Individuals – AI as ‘gatekeepers’
  - Creation of new folders
  - Access rights
  - Annual review of files
  - Disposition

- Organization of Shared Drives
  - By organizational lines – program areas and divisions
  - By Records Retention Schedule
The Project

- IT Project Management
- Charter
  - Problem Statement and Description
  - Goals and Objectives
  - Scope
  - Success Factors
- Project Organization
- Project Milestones
Methodology

- Shared role between IT and RM
- Top-down support
- Scheduling
- Training
- Consultation
- Updating management of progress
- News articles in monthly newsletter
- ‘Grass-roots’ impact
Drive Structure

- Agency wide shared drive
- Divided into two basic directories
  - Controlled – adhere to records retention schedule for records kept longer than 90 days
    - Program area
    - Division
    - Records Series
  - 90Temp – transitory records, 90 day retention
Classification

- Keep it simple
- Classify folders on shared drive according to retention schedule
- Naming conventions based on org chart and schedule
- Examples:
  - Program Area
  - Division
    - GenCorrespondence 1
    - Procedures US+1
    - Staff Mtg Notes 1
Process

- Train and consult with groups and individuals
- Program areas – 9 areas
  - Training – one hour overview, one and half hour training for each program area, includes processes, procedures, checklists
  - Consulting – 46 AIs – sit with each one and review and classify folders
  - Accountability – AIs must sign off completion of tasks
Process...cont

- Duplicate file report
- Review of existing files
- Official versus duplicate record
- Identify current files that have met retention
Metrics

- Project starts June 2010
- Beginning files – 90,041
- Ending files – 57,487
- Net decrease – 32,554 or 36%
- Beginning folders – 7,526
- Ending folders – 5,201
- Net decrease – 2,325 or 31%
Final Steps

- Mix of duplicate, transitory, and obsolete records
- Cleaning the refrigerator analogy
- Classify what is left
- Disposition
Maintenance

- IT to monitor drive usage and available space
- IT to investigate and report on critical usage issues
- RM conduct semi-annual meetings for Records Liaisons and Authorized Individuals
- RM to administer semi-annual disposition of all records
Lessons Learned

- First do no harm
- Be flexible and think holistically
- Build your team
- Start with your ‘friends’
- The “toothpaste” effect - metrics
- Technical issues – path names, embedded links
- The value of a good project manager
Thank You

- **Contact:**
  Tim Nolan
  Texas Water Development Board
  [Tim.nolan@twdb.state.tx.us](mailto:Tim.nolan@twdb.state.tx.us)
  512-463-7725