



Records Management vs. #recordsmanagementrocks!

Successfully navigating the intersection
of IT and Records when multiple
generations are involved

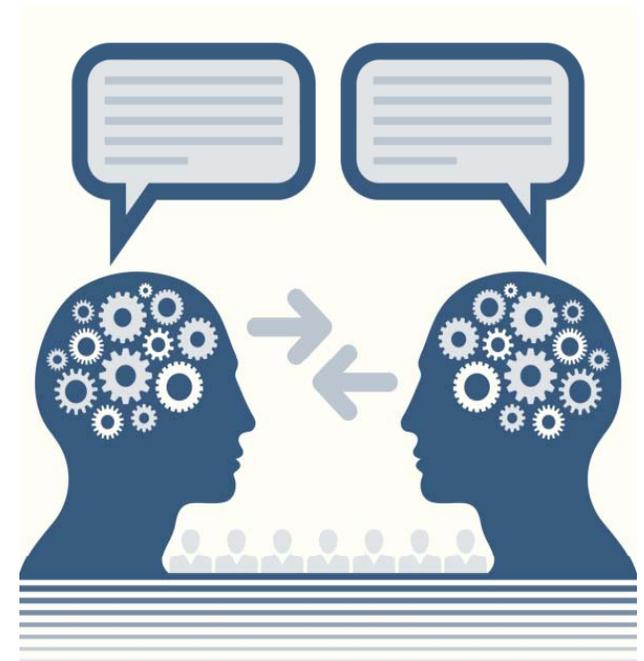
Who am I and what are we learning about today?

What will we learn....

- Generations in today's workforce
- Communication methods
- SharePoint

A little about me....

- Member of Generation X
- 10 years in State Government
- Mom of 2 Millennials



Who is out there in the workforce?

Traditionalists

- 1900-1945

Baby Boomers

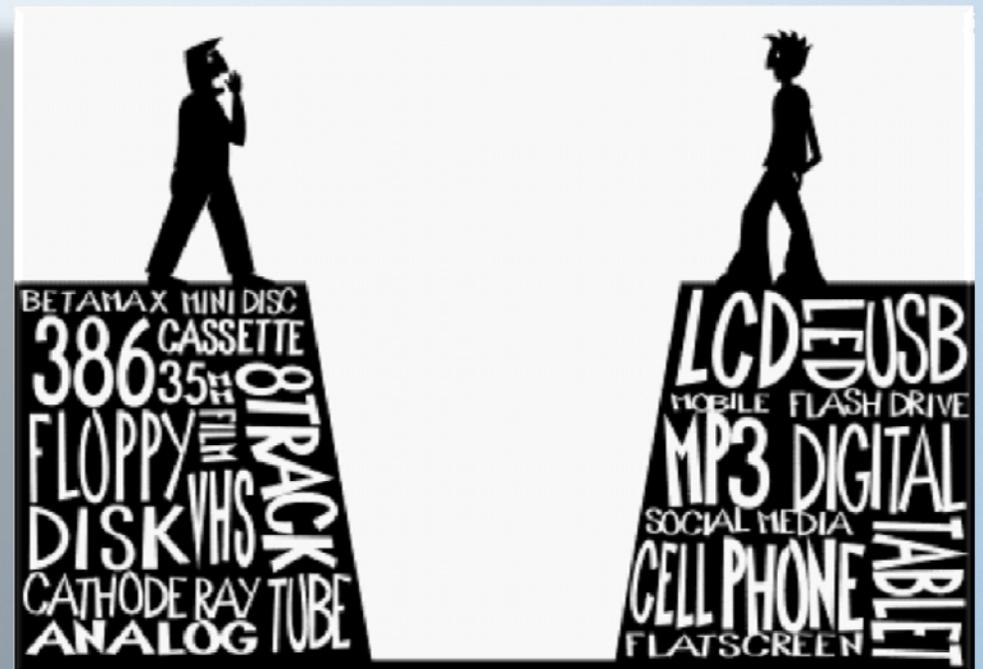
- 1946-1964

Generation X

- 1965-1981

Millennials

- 1982 - current





"The only thing we have to fear is fear itself."
Franklin D. Roosevelt

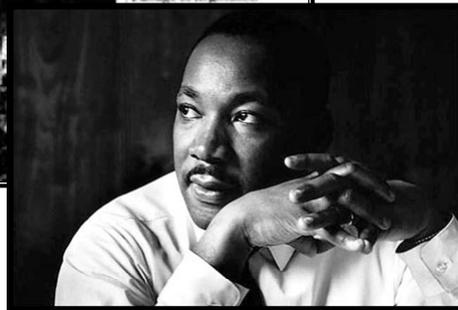


"Good night, and good luck."
Edward R. Murrow

Traditionalist 1900-1945

➤ Influences and defining events

- Great Depression
- Dust Bowl
- FDR's New Deal
- Pearl Harbor & World War II
- Radio/Television
- Empire State Building completed
- Space Age



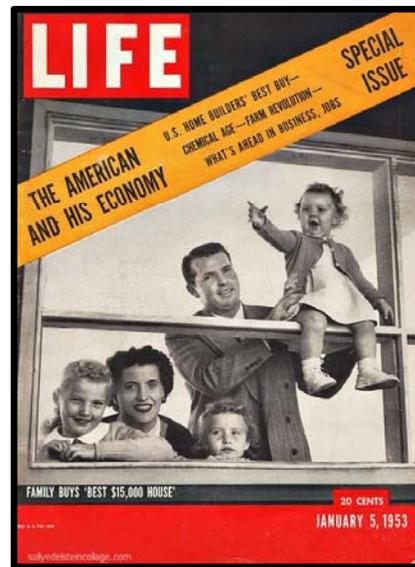
"Life's most persistent and urgent question is, what are you doing for others."

Martin Luther King Jr.



"Efforts and Courage are not enough without purpose and direction."

John F. Kennedy



Baby Boomers 1946-1964

➤ Influences and defining events

- Civil rights movement
- Vietnam War
- Cold War
- Space Travel
- Woodstock
- Economic prosperity

COLD WAR

Generation X 1965-1982

➤ Influences and defining events

- Watergate
- End of Cold War
- Dual Income Families/Mothers working outside of home
- 1st Generation with latchkey kids
- Corporate downsizing
- Oklahoma City Bombing
- "Be all YOU can be."

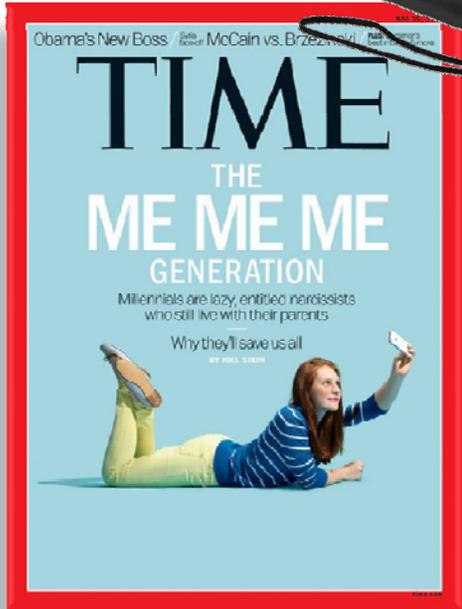




Millennials 1982-current

Gen Y 1982-1995 & Gen Z 1995-2016

➤ Influences and defining events



- Google/Yahoo
- Blogging
- Wikipedia
- Myspace, Facebook, Instagram, Twitter and Snapchat
- Economic expansion
- 9/11 Terrorist Attacks
- "Be all WE can be."

Technology is different to everyone

Traditionalists

- The Hoover Dam

Baby Boomers

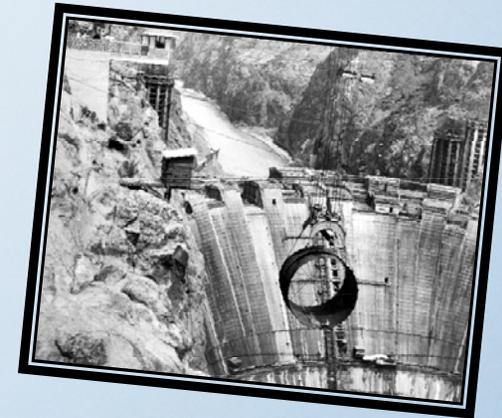
- The Microwave

Generation X

- Tangible

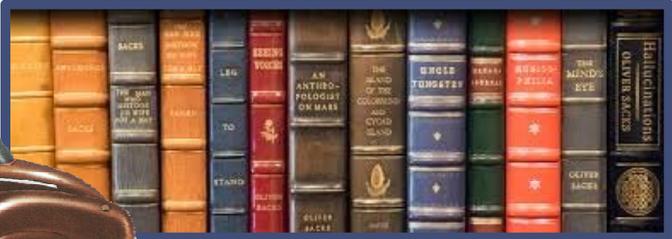
Millennials

- Intangible



Traditionalists – Records & Technology

- Documents
- Newspapers
- Radio
- Books and Magazines
- Rotary Phones
- Automobiles
- Postcards, Telegrams, letters



Baby Boomers – Records & Technology



- Records maintained by paper
- Room sized computers
- Floppy discs
- Touchtone phones
- Reel to Reel film
- Microwave



Generation X – Records & Technology



- Floppy discs
- VHS
- Cassettes
- Portable phones
- CDs
- Dial up internet
- Email, Chat Rooms
- Newspapers



Millennials – Records & Technology



- Cloud storage & Services
- Social Media
- Email
- Wi-Fi internet
- Smart phones, emoji
- Flat screens and HD



Communication Styles



Traditionalists

- Discrete

Baby Boomers

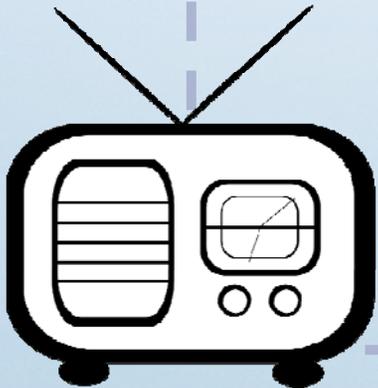
- Diplomatic

Generation X

- Blunt/Direct

Millennials

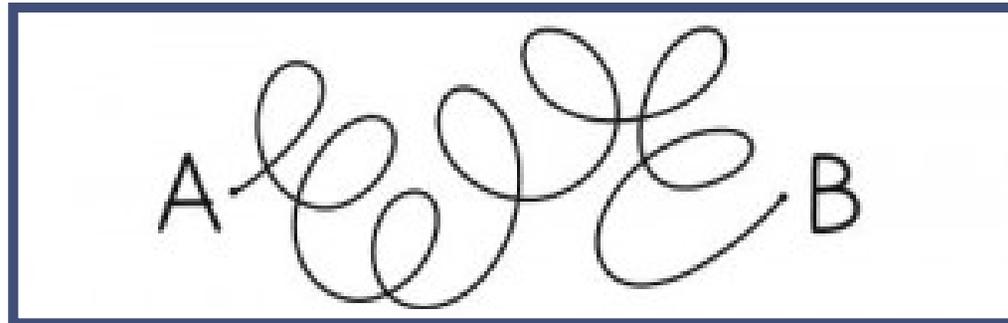
- Politically Correct/Polite



The communication path

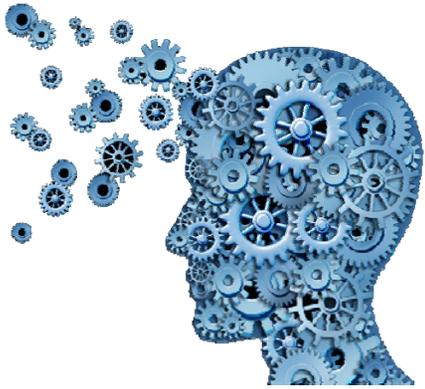


Planned



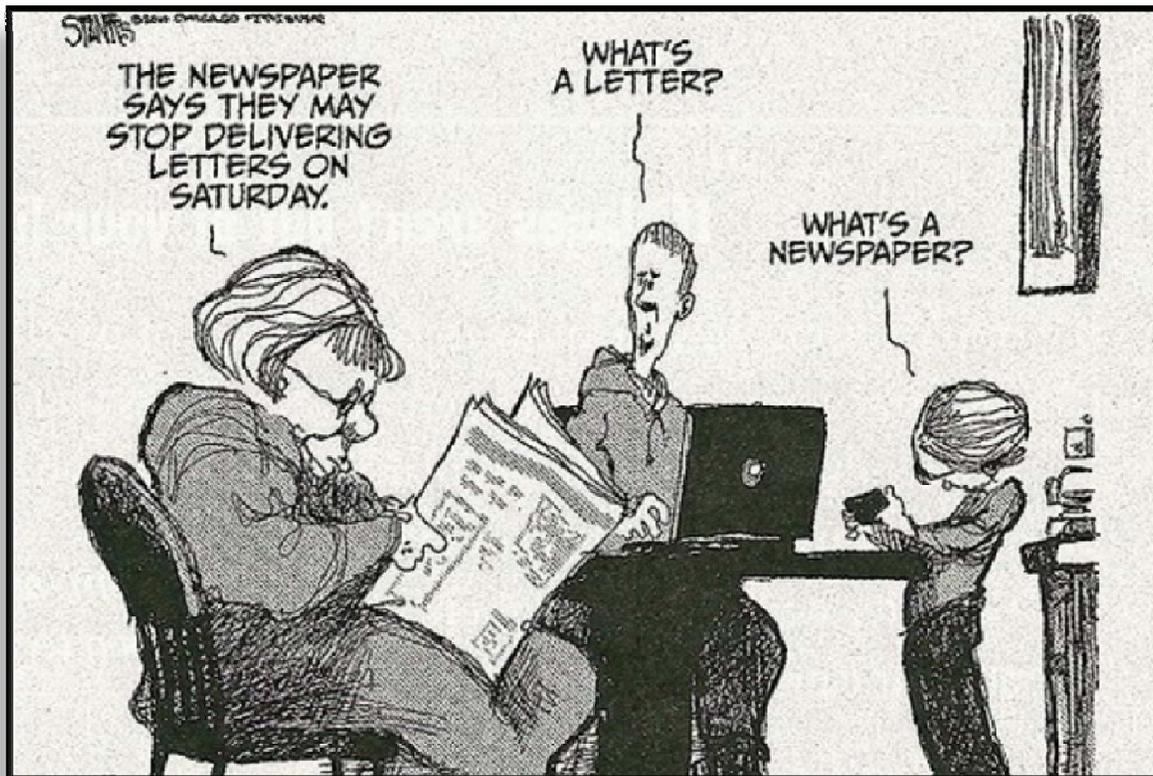
Actual

Talking a different language



	Traditionalists	Baby Boomers	Gen X	Millennials
Methods	Written	In person	Written or in person	Electronic
Work Ethics	Dedicated; focused on quality	Driven; willing to work long hours to get the job done	Balanced; focused on productivity	Ambitious; key driving force is being a contributor
Technology Style	Adapted	Acquired	Assimilated	Integral

Adapting our methods

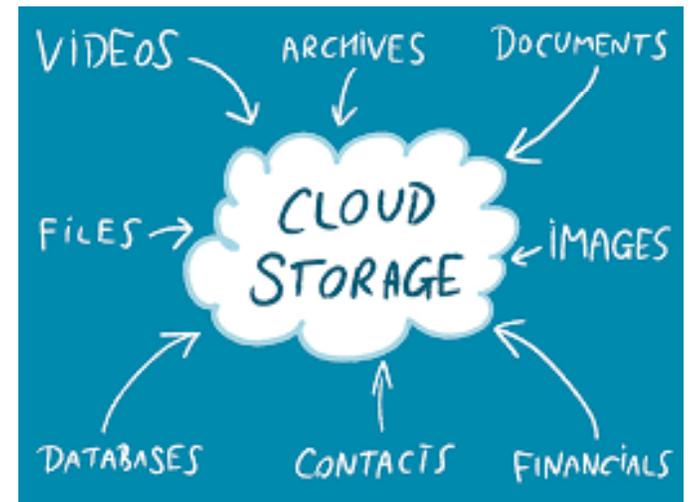


- Handwritten communication
- Electronic communication; email, blog posts, video conferences
- Manuals, Standard Operating Procedures
- Visuals; PowerPoints, live action videos, pictures
- Face to face
- By phone

Paper to poof!

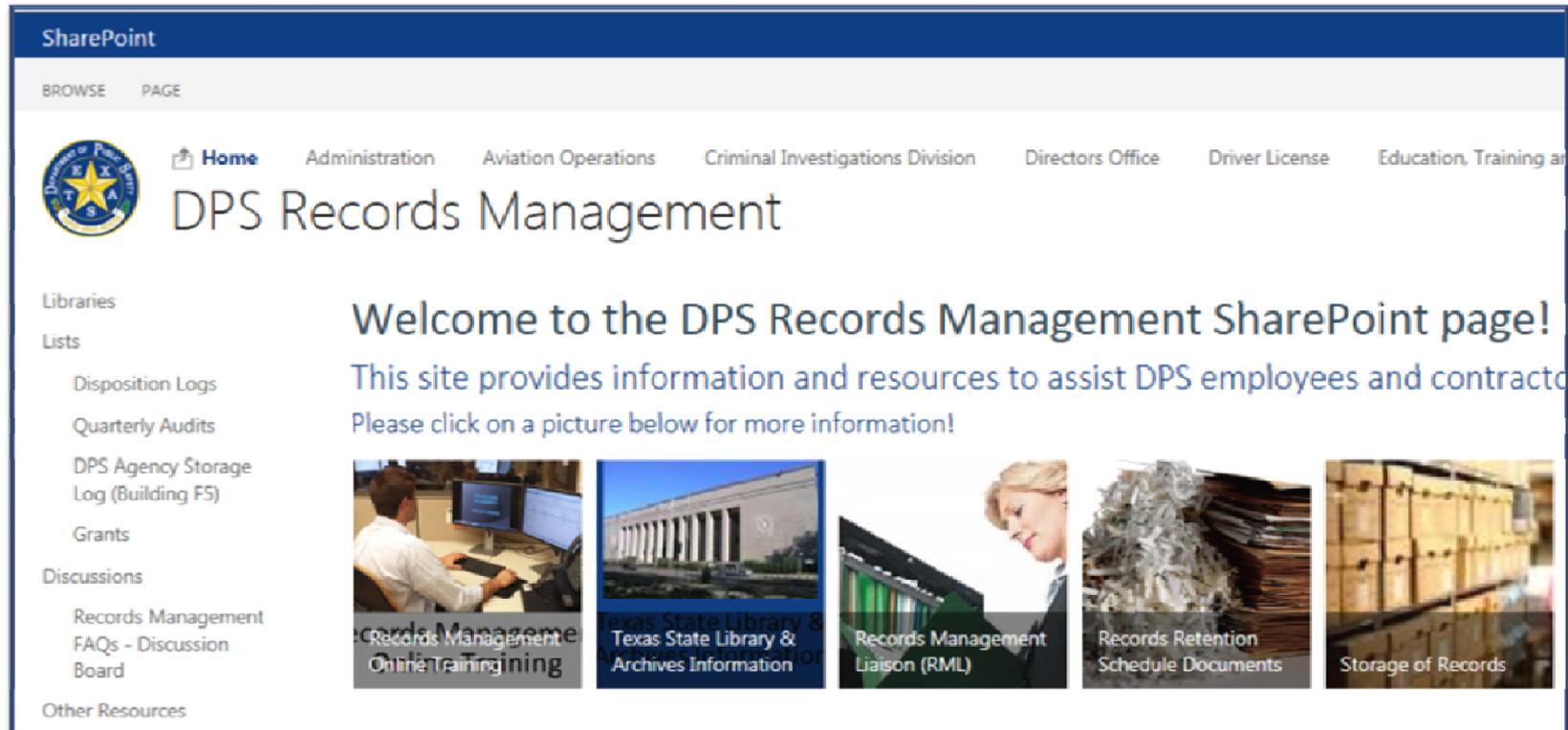


The gray area



How do we successfully transition from physical to virtual records?

Managing the paper to poof transition



The screenshot shows a SharePoint page for "DPS Records Management". The page features a navigation bar with links to Home, Administration, Aviation Operations, Criminal Investigations Division, Directors Office, Driver License, and Education, Training and Development. The main content area includes a welcome message: "Welcome to the DPS Records Management SharePoint page! This site provides information and resources to assist DPS employees and contractors. Please click on a picture below for more information!". Below the message are five image tiles: "Records Management Online Training", "Texas State Library & Archives Information", "Records Management Liaison (RML)", "Records Retention Schedule Documents", and "Storage of Records". A left-hand navigation pane lists various resources such as Disposition Logs, Quarterly Audits, and Grants.

- SharePoint:
Your tool for success in the gray area; technology accessible by all generations!



Disposition Logs ▾ Default

Libraries

Lists

Disposition Logs

- Quarterly Audits
- DPS Agency Storage Log (Building F5)
- Grants
- Discussions
 - Records Management
 - FAQs - Discussion Board
- Other Resources
 - Site Pages
 - Calendar
 - Tasks
- EDIT LINKS
- Site Contents

[+ new item or edit this list](#)

Default Active Issues Administration ...

Issue ID	Requestor (RML)	Division	DPS Agency #
50	Powers, Mary Ann	Texas Highway Patrol*	DPS.0135*; DPS.0144; DPS.0171; DPS.0153
287	Smith, Zoe	Law Enforcement Support Division*	DPS.0291
298	Smith, Zoe	Law Enforcement Support Division*	DPS.0099*
962	Howard, Jennifer	Law Enforcement Support Division*	DPS.0298
1000	Lazarine, Vanessa	Law Enforcement Support Division*	DPS.0257
1026	Hinesley, Barbara	Directors Office*	DPS.0502
1032	Whiting, Katherine S	Administration*	DPS.0000
1041	Whiting, Katherine S	Administration*	DPS.0000
1056	Howard, Jennifer	Law Enforcement Support Division*	DPS.0213; D
1057	Howard, Jennifer	Law Enforcement Support Division*	DPS.0425

Disposition Logs -

VIEW

Edit Item

Delete Item

Manage

Version History

Alert Me

Shared With

Workflows

Actions

Division	Law Enforcement Support Division*
Departments	Crime Lab – Midland
District	
Requestor (RML)	Howard, Jennifer
DPS Agency #	DPS.0213,DPS.0215
Record Series Title	Overtime Authorizations Time Cards And Time Sheets
Current Retention Period	2 4
Description of Records	



Quarterly Audits - Default

Libraries

Lists

Disposition Logs

Quarterly Audits

DPS Agency Storage Log (Building F5)

Grants

Discussions

Records Management FAQs - Discussion Board

Other Resources

Site Pages

Calendar

Tasks

EDIT LINKS

Quarterly Audits

Quarter Reporting

+ new item or edit this list

Default Find an item SAVE THIS VIEW

Issue ID	Division	Disposition Log #	Name of person completing this form (RML)	Quarter
1096	Law Enforcement Support Division*	1057	Howard, Jennifer	2016 3 (Sept)
1116	Law Enforcement Support Division*	1056	Howard, Jennifer	2016 4 (Dec)
1115	Administration*	1052	Billstone, Jayson	2016 4 (Dec)
1114	Law Enforcement Support Division*	1045	Heine, Tierra	2016 4 (Dec)
1112	Texas Highway Patrol*		Moller, Marilyn	2016 3 (Sept)
1113	Regional Commanders*		Faucett, Lori	2016 3 (Sept)
1117	Homeland Security*		Esparza, Adriane	2016 4 (Dec)
1053	Administration*	1051	Billstone, Jayson	2016 3 (Sept)
1094	Texas Highway Patrol*	1031	Parker - Rogers, Jacklyn	2016 3 (Sept)
1093	Texas Highway Patrol*	1030	Parker - Rogers, Jacklyn	2016 3 (Sept)
1092	Texas Highway Patrol*	1029	Parker - Rogers, Jacklyn	2016 3 (Sept)

Quarterly Audits -

VIEW

Version History	Alert Me
Shared With	Workflows
Edit Item	Delete Item
Manage	Actions

Quarter Reporting

2016 4th Quarter (Oct-Dec)

Division

Law Enforcement Support Division*

Departments

Crime Lab - Midland

District

Name of person responsible for maintaing records

Gomez, Marissa Silva

DPS Agency #

DPS.0213: DPS.0215

Tools to help your organization

The Texas Record - Texas State Library Records Blog

This blog is maintained by the [Records Management Assistance](#) unit of the State and Local Records Management (SLRM) division of the Texas State Library and Archives Commission. The SLRM division assists Texas state agencies and local governments in establishing and implementing records and information management programs.

[View](#) and subscribe now!

Leverage the tools at your fingertips:

- SLRM Blog Posts
- Archived Training videos
- RMICC - Records Management Interagency Coordinating Council



Tools to help your organization



Educate employees

Make your schedule accessible

Retention Schedule Documents

+ new document or drag files here

All Documents Administration Aviation Operations ...

Name

Approved DPS Records Retention Schedule.20141222

Agency Wide Amendments - 12.22.2014

Topic: Alerts (1)

Alerts

How do I set up an alert to inform me when a disposition log has

Topic: Amendments to the Schedule (1)

Amendments to the Schedule

Do I submit form SLR 122 for a change to the OGC retention sch

Topic: Audits (7)

Audits

Texas Highway Patrol Captain's Admins are currently responsible

Audits

Can you audit documents not on the retention Schedule?

Audits

Can I audit electronic records?

Audits

Are these the only audits that will be completed for records each

Audits

How do I audit records for my division?

Audits

How do I choose what areas within my division to perform an au

Audits

What is the purpose of conducting records audits?

31333024

30141333

Create a
Discussion Board



Leverage
the Library

Retention Period Calculator

File  Open in Excel  Data ▾  Find					
	A	B	C	D	E
1	RETENTION	MUST BE OLDER THAN	RETENTION	MUST BE OLDER THAN	RETENTION
2	10 days	10/5/2014	AC+90 days	7/17/2014	CE+1 year
3	90 days	7/17/2014	AC+1 year	10/15/2013	CE+2 years
4	3 months	7/15/2014	AC+2 years	10/15/2012	CE+3 years
5	1 year	10/15/2013	AC+3 years	10/15/2011	CE+5 years
6	13 months	9/15/2013	AC+4 years	10/15/2010	CE+10 years
7	2 years	10/15/2012	AC+5 years	10/15/2009	CE+15 years
8	3 years	10/15/2011	AC+6 years	10/15/2008	FE+1 year
9	4 years	10/15/2010	AC+7 years	10/15/2007	FE+2 years
10	5 years	10/15/2009	AC+10 years	10/15/2004	FE+3 years
11	10 years	10/15/2004	AC+15 years	10/15/1999	FE+5 years

Deep in the heart....



Methods to take your message statewide:

- Group and/or agency wide emails
- Training sessions
 - In person session
 - WebEx Session
- Instant Message/Screen Sharing
- Phone calls
- Agency Blog

Strength in diversity

- **Traditionalist** – Experienced, consistent and dependable
- **Baby Boomer** – Hard working, breaks down big picture into manageable tasks and good team players
- **Generation X** – Adaptable, tech savvy and determined
- **Millennials** – Collaborative, tech savvy and tenacious

Get
Creative
&
Collaborate!



Questions?

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