DATA MAPPING:
Finding An Organization’s True Treasure

Deborah Robbins, PayPal, CRM

E-Records Conference 2018
OBJECTIVES

• Define Data Mapping from a RIM Perspective
• Components and Planning
• Creating an Assessment Tool
• Leveraging Results
Maps of Austin

Creating a Unique Map
DATA MAPS
IT VS. RIM PERSPECTIVES

TECHNOLOGY

• Data Elements
• Data Lineage
• Dataflow
• Schema Matching
• Data Integration

RECORDS/INFO MANAGEMENT

• Identify Business Records
• Repository Identification
• Retention Requirements
• Legal Holds/Disposition
DEVELOPING A HYBRID TOOL

Records Inventory
- Electronic & Hardcopy
- Original/Duplicate
- Retention
- Privacy Level
- Info Security Level
- Vital/BCP/DR

Data Map
- Electronic ONLY
- Processes/Business Functions
- System Specs
- Data History
Knowing Your Information Landscape

DATA
INFORMATION
RECORDS
Knowing Your Records Landscape

- RECORDS
- SECURE
- PII/HIPPA
Knowing Your TSLAC Landscape

- Records
- Historical
- Vital
COMPONENTS AND PLANNING

- Determine scope (targeted or comprehensive) and approach
- Identify methodology and tools
- Identify strategic partners
- Gather information
- Analyze and validate results
- Address remediation
1. Clean House
2. Take Out Trash
3. Organize closet
Who are we?
COMPONENTS AND PLANNING

- Determine scope (targeted or comprehensive) and approach
- Identify methodology and tools
- Identify strategic partners
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COMPONENTS AND PLANNING

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The Treasure You Seek

Record Types (Classes)

Format

Location
Table of Contents

- **Introduction**
- **Part 1: Administrative Records**
  - Section 1-1: Records of Governing Bodies
  - Section 1-2: General Records
- **Part 2: Financial Records**
  - Section 2-1: Fiscal Administration and Reporting Records
  - Section 2-2: Accounting Records
- **Part 3: Personnel and Payroll Records**
  - Section 3-1: Personnel Records
  - Section 3-2: Payroll Records
- **Part 4: Support Services Records**
  - Section 4-1: Purchasing Records
  - Section 4-2: Facility, Vehicle, and Equipment Management Records
  - Section 4-3: Communication Records
  - Section 4-4: Workplace Safety Records
- **Part 5: Information Technology Records**
  - Section 5-1: Records of Automated Applications
  - Section 5-2: Computer Operations and Technical Support Records
# TSLAC Records Inventory and Analysis Form

## INVENTORY (to be completed by inventory taker)
1. Records Inventory Taker (name, telephone, extension)
2. Office
3. Department
4. Records Series Location (building, room, storage equipment)
5. Record Working Title
6. Describe Records Series (purpose, content, from numbers) (Continue description on reverse, if needed)
   - Component documents (please number)
     - ( )
     - ( )
     - ( )
     - ( )
     - ( )
     - ( )
   - Format and Size
     - Paper
     - Record Type
     - Bound Volume
     - Video Tape
     - Computer Media
     - Microfilm
7. Inclusive Dates
8. Volume (cubic feet)
9. Records Liaison Officer Review, Initials, and Date

## ANALYSIS (to be completed by records liaison officer)
11. Records Liaison Officer (name, telephone, extension)
12. Record Copy? Yes No
13. If yes, what other dept. have copies?
14. If no, what dept. has record copy? Yes No
15. Is record series obsolete? Yes No
16. Vital Record? Yes No
17. Access Restricted?
18. State Record Number
19. State Retention Period
20. Department Retention Recommendations (state reason for recommendations; if inactive storage available, divide retention period between office and storage)
21. Department Head Review, Initials and Date
22. Record Number
23. Records Series Title
24. Retention Period
   - Office
   - Storage
   - Total
25. Disposition and Special Considerations

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**For use of Records Management Officer and Committee**

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**SLR-003 (12/92)**
Record Types (Classes)

ADMINISTRATIVE
Organizational Information
Communications
Meeting Minutes
Charter
Publications
Policy/Procedures

FINANCIAL
Audit
Bonds
Assets
Accounts Payable/Receivable
Reports
Budgets

PERSONNEL & PAYROLL
Applications/Hiring
Personnel File
Training
Pensions
Affirmative Action
Disciplinary Actions
Format

Paper Records
Digital – Excel/Word/PP
Digital – PDF
Digital – Forms/Web-Based
Digital – CDs/Thumb Drive
Back Tapes
Location

Shared Drives/File Shares
Email System
Onsite Filing
Offsite Storage
Cloud Storage
EDMS
Workday
SAP
Oracle
Adobe Marketing System
Confluence
Box
Skype
Slack
Google Drive
HAVE YOU SEEN MY SHOVEL?
<table>
<thead>
<tr>
<th>Department/ Function</th>
<th>Record Class</th>
<th>Format</th>
<th>Location</th>
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<td>Records of Governing Bodies</td>
<td>Digital</td>
<td>SharePoint</td>
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<td>Records of Governing Bodies</td>
<td>Paper</td>
<td>Offsite Storage</td>
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**Local Government Retention Schedules**

**Texas State Records Retention Schedule (4th Edition)** - Texas State Library | TSLAC
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Who are we?
WAYS TO REDUCE CLUTTER

“Work Smarter – Not Harder”

How do you eat the elephant? – One bite at a time!

Many hands make the work light
QUESTIONS/SOLUTIONS