

The background is a dark blue gradient. In the corners, there are white line-art graphics resembling circuit boards or data paths, with lines ending in small circles.


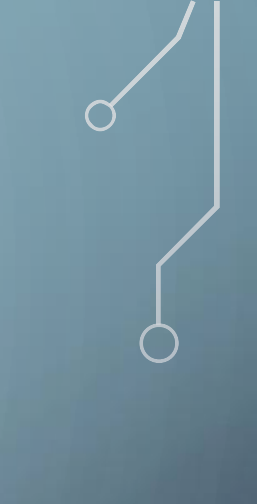
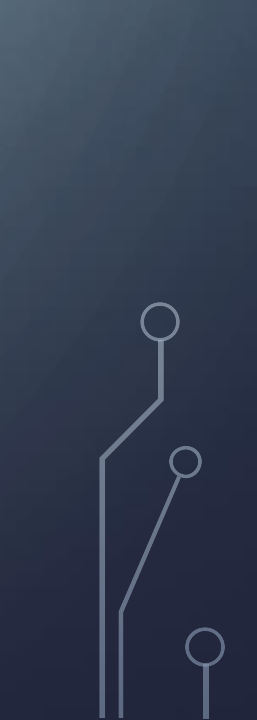
DATA MAPPING: Finding An Organization's True Treasure

Deborah Robbins, PayPal, CRM

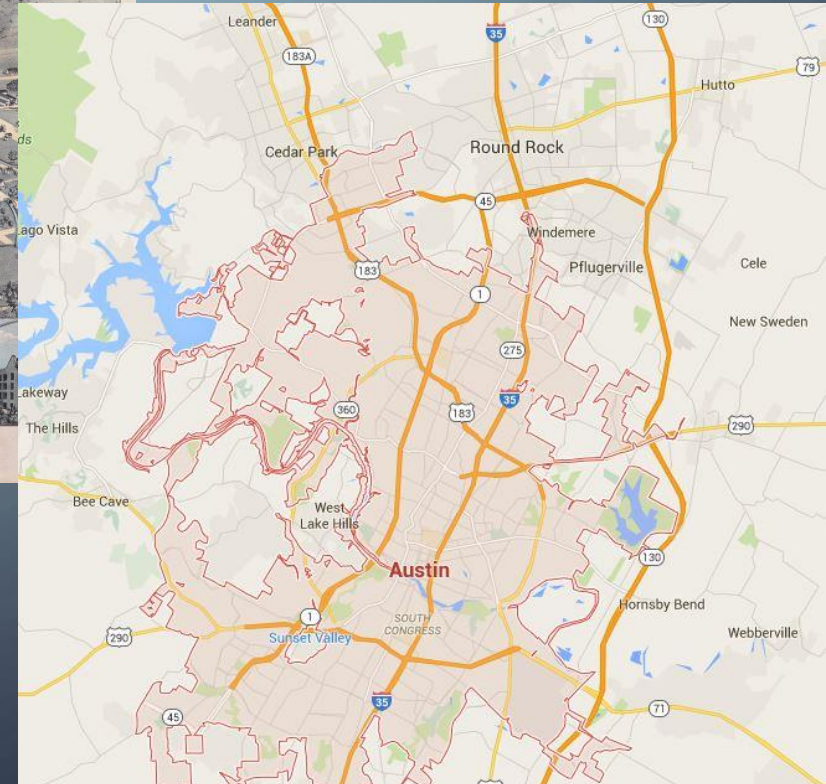
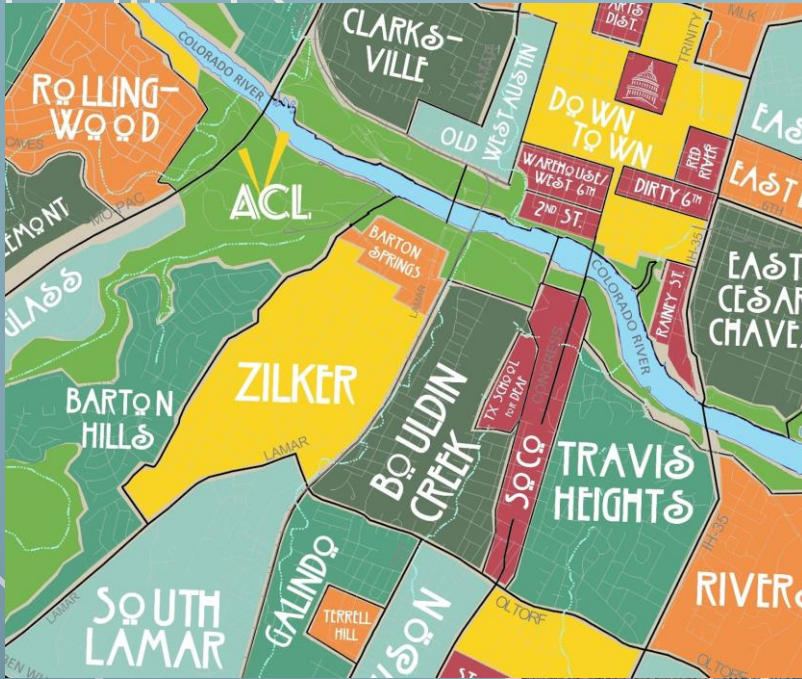
E-Records Conference 2018



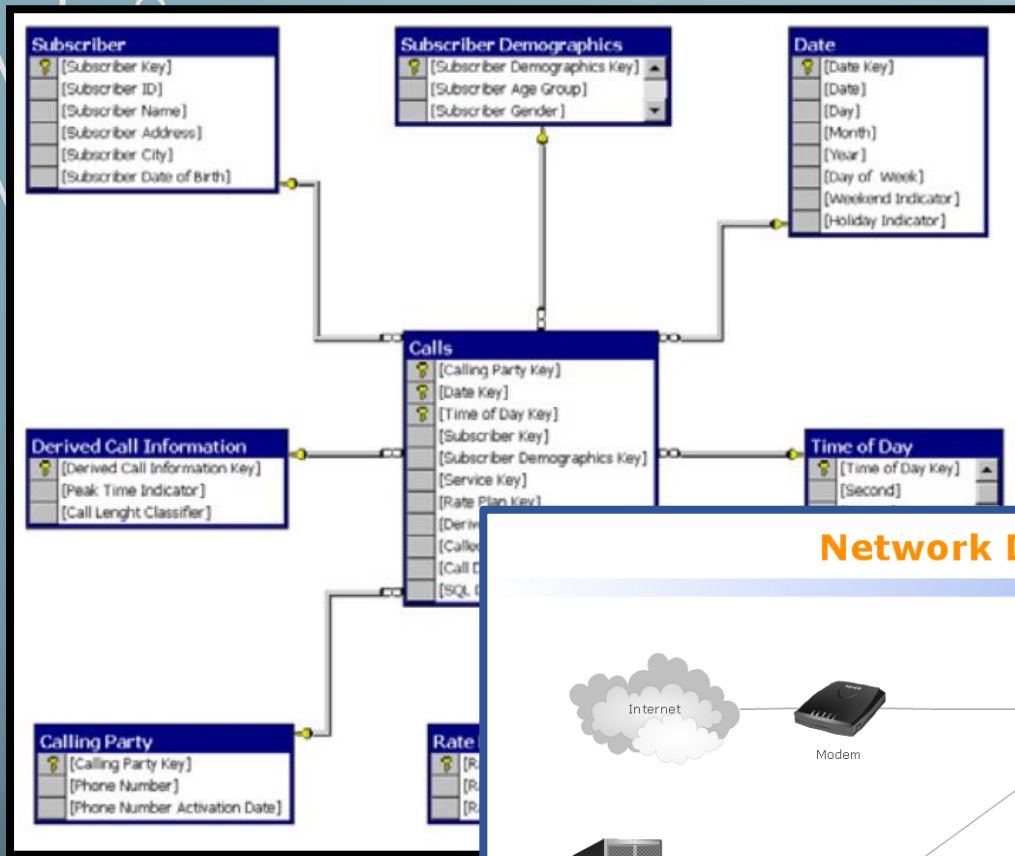
OBJECTIVES

- Define Data Mapping from a RIM Perspective
 - Components and Planning
 - Creating an Assessment Tool
 - Leveraging Results
- 
- 
- 

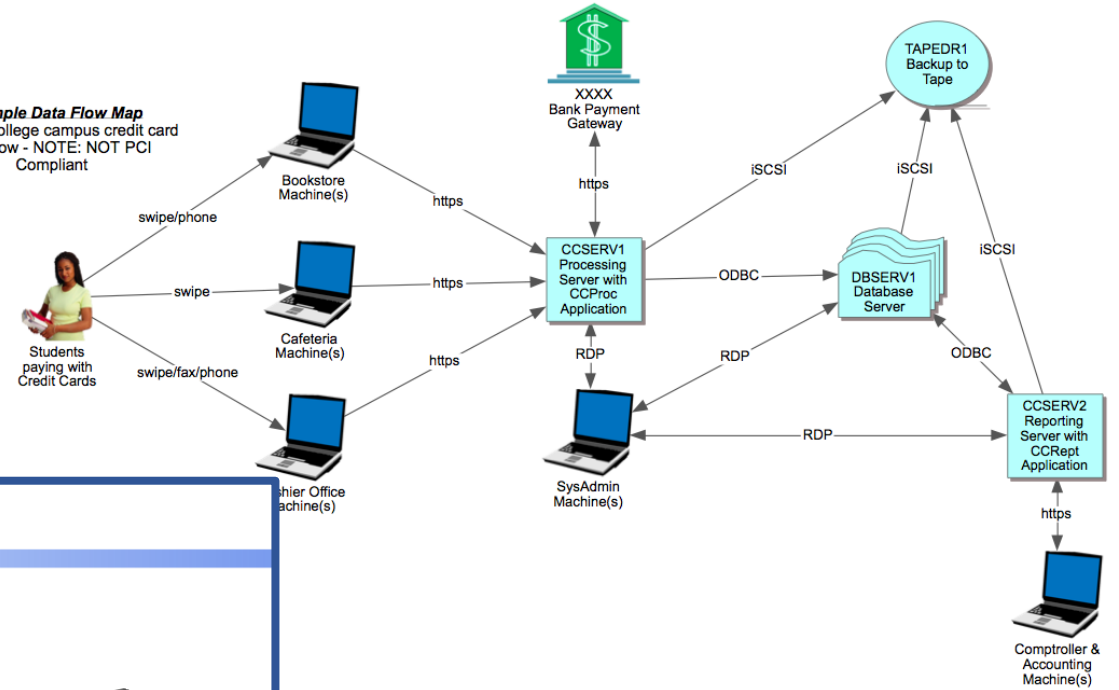
Maps of Austin



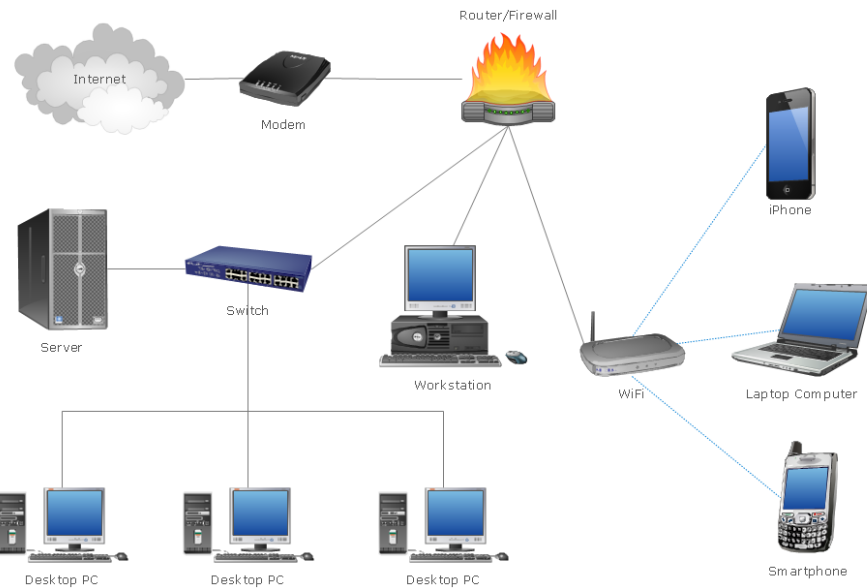
Creating a Unique Map



Example Data Flow Map
- a small college campus credit card data flow - NOTE: NOT PCI Compliant



Network Diagram



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

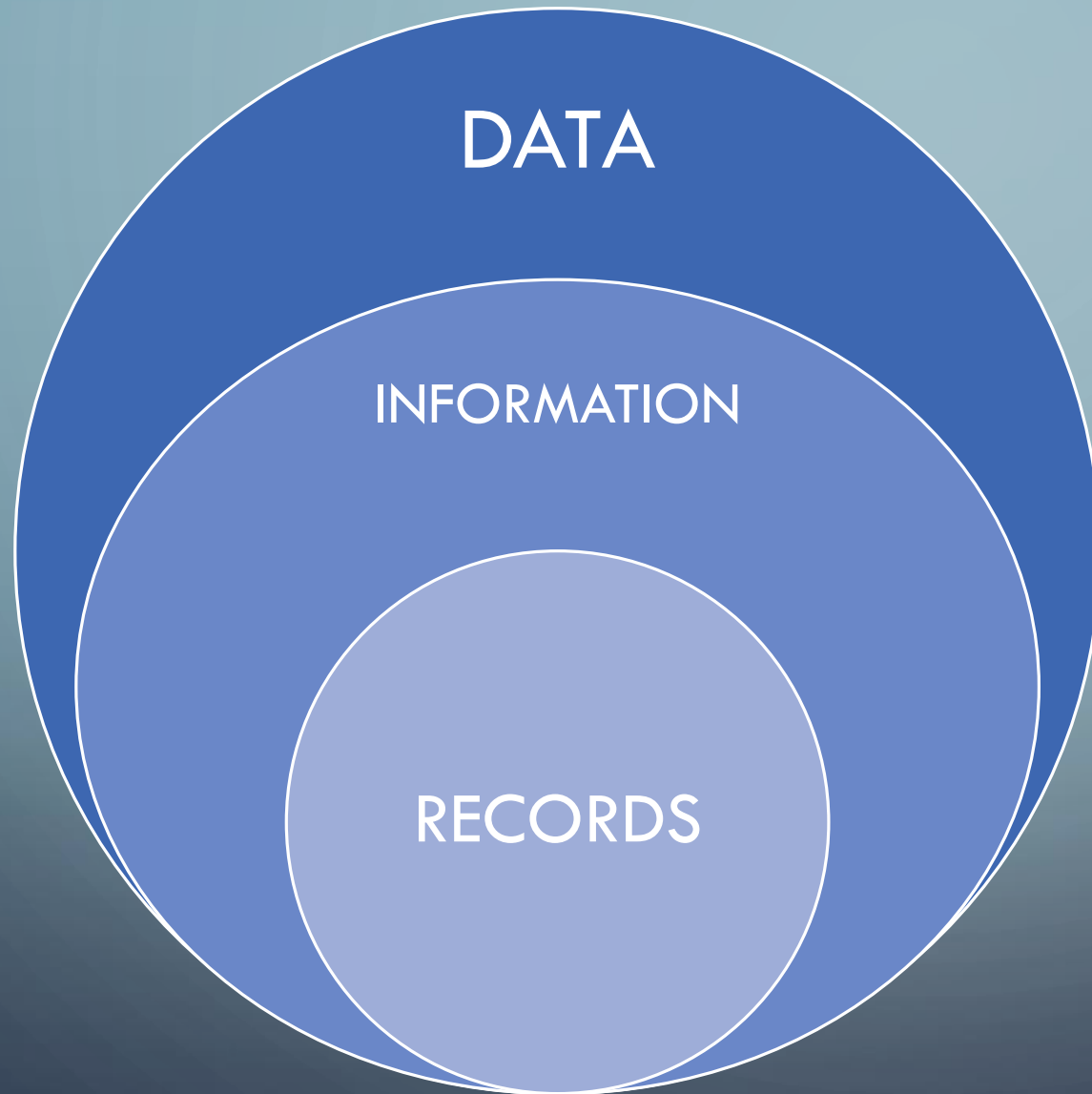
Records Inventory

- 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



Knowing Your Records Landscape



Knowing Your TSLAC Landscape

COMPONENTS AND PLANNING

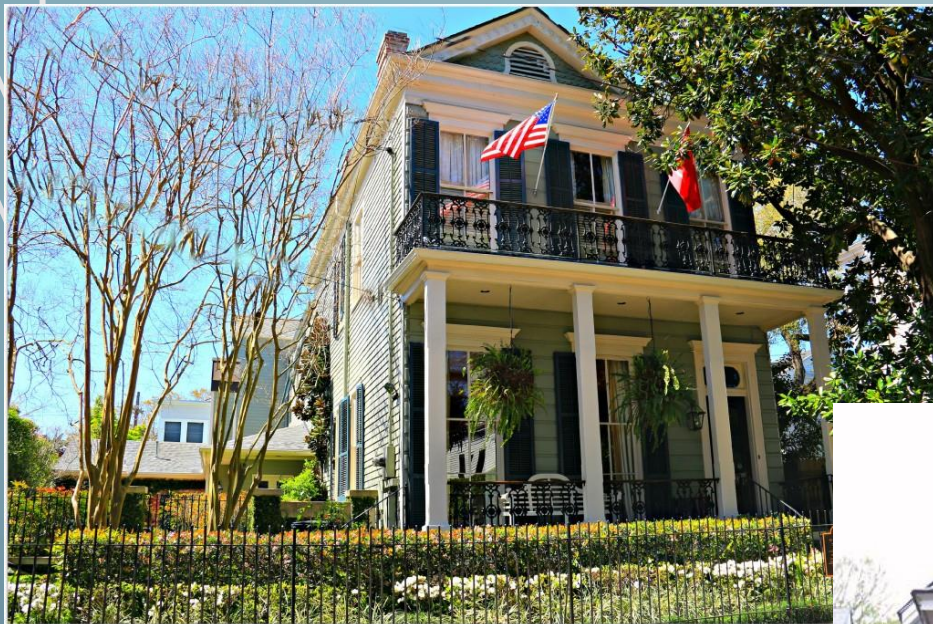
- **Determine scope (targeted or comprehensive) and approach**
- Identify methodology and tools
- Identify strategic partners
- Gather information
- Analyze and validate results
- Address remediation



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**
- Gather information
- Analyze and validate results
- Address remediation

COMPONENTS AND PLANNING

- Determine scope (targeted or comprehensive) and approach
- Identify methodology and tools
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- **Gather information**
- **Analyze and validate results**
- **Address remediation**

The Treasure You Seek

Record Types
(Classes)

Format

Location

**Department/
Function/Business
Process**

**Record Types
(Classes)**

Format

Location

**Department/
Function**

Administration

Finance/
Accounting

Personnel

Support Services

Information
Technology



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 - [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

Texas State Library • State and Local Records Management Division
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, contents, form numbers) (Continue description on reverse, if needed)	
»	
Component documents (please number)	
()	»
()	»
()	»
()	»
()	»
()	»
()	»
7. Format and Size	
Paper _____	Audiotape _____
Bound Volume _____	Videotape _____
Computer Media _____	Microfilm _____
8. Inclusive Dates	9. Volume (cubic feet)
10. 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 depts. have copies?	
14. If no, what dept. has record copy?	15. Is records series obsolete? Yes _____ No _____	
16. Vital Record? Yes _____ No _____	17. Access Restricted? Yes _____ No _____	
18. State Record Number «	19. State Retention Period	20. Department Retention Recommendations (state reason for recommendation; if inactive storage available, divide retention period between office and storage)
«		
«		
«		
«		
«		
«		21. Department Head Review, Initials and Date
«		
For use of Records Management Officer and Committee		
22. Record Number	23. Records Series Title	
24. Retention Period Office _____ Storage _____ Total _____		
25. Disposition and Special Considerations		

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

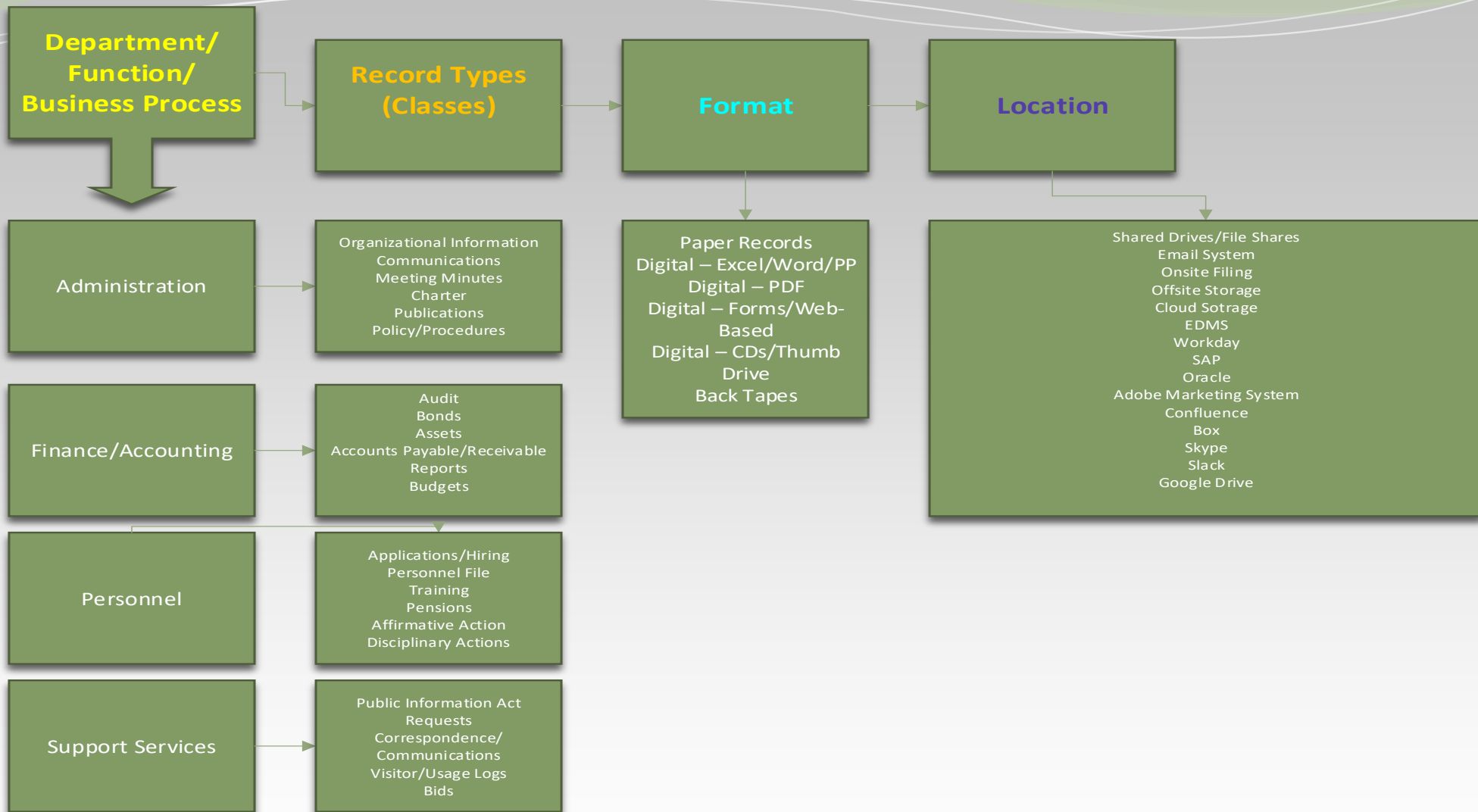
Confluence

Box

Skype

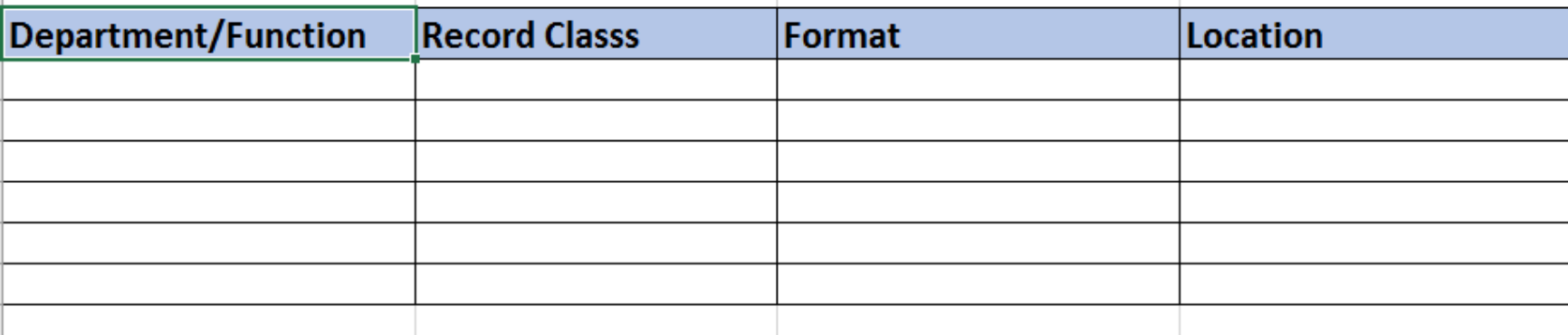
Slack

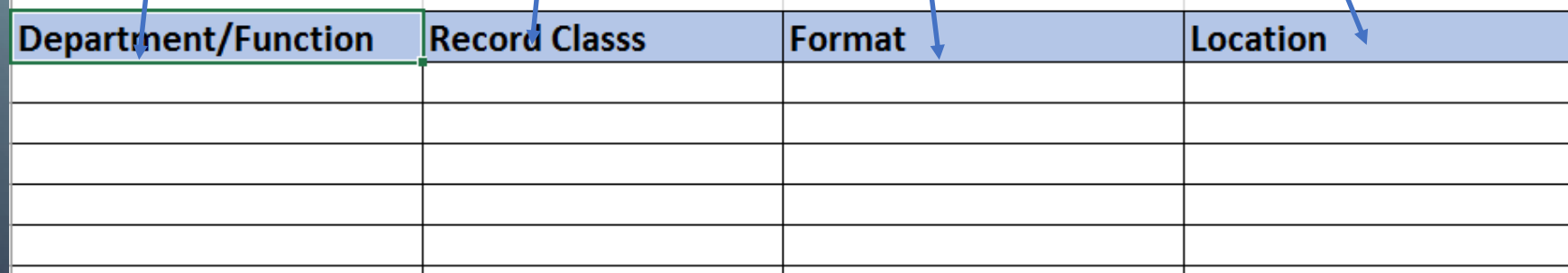
Google Drive



HAVE YOU SEEN MY SHOVEL?







INFORMATION INVENTORY

[Local Government Retention Schedules | TSLAC](#)

[Texas State Records Retention Schedule \(4th Edition\) - Texas State Library | TSLAC](#)

Department/ Function	Record Class	Format	Location
Administrative Records			
	Records of Governing Bodies	Digital	SharePoint
	Records of Governing Bodies	Paper	Offsite Storage
	General Records		
Financial Records			
	Fiscal Administration and Reporting Records		
	Accounting Records		
Personnel and Payroll Records			
	Personnel Records		
	Payroll Records		

Figure: 13 TAC §7.125(a)(1)

Effective April 17, 2016

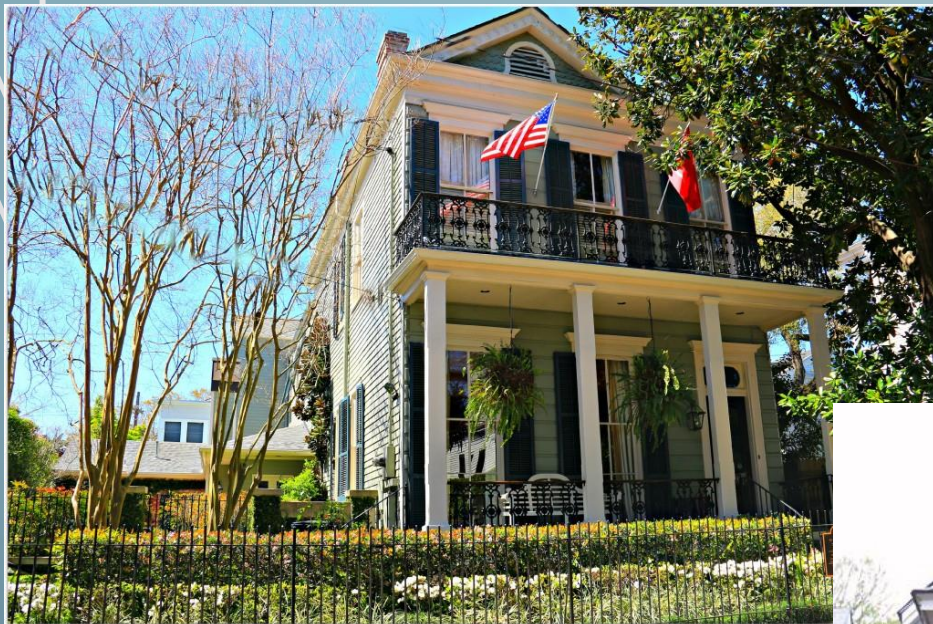
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INFORMATION INVENTORY

				Local Government Retention Schedules TSLAC
				Texas State Records Retention Schedule (4th Edition) - Texas State Library TSLAC
Department/ Function	Record Class		Format	Location
Administrative Records				
	Records of Governing Bodies		Digital	SharePoint
		Agendas		
		Minutes		
		Open Meeting Notices		
	Records of Governing Bodies		Paper	Offsite Storage
		Agendas		
		Minutes		
		Open Meeting Notices		
	General Records			
Financial Records				
	Fiscal Administration and Reporting Records			

INFORMATION INVENTORY								
Department/ Function	Record Class		Format	Location		Security	PII/PHI	RRS
Administrative Records								
	Records of Governing Bodies		Digital	SharePoint				
		Agendas						
		Minutes						
		Open Meeting Notices						
	Records of Governing Bodies		Paper	Offsite Storage				
		Agendas						
		Minutes						



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





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An abstract graphic on the left side of the slide, consisting of white lines and circles on a dark blue background, resembling a circuit board or a network diagram. The lines are vertical and horizontal, with some diagonal connections, and the circles are small and white.

QUESTIONS/SOLUTIONS