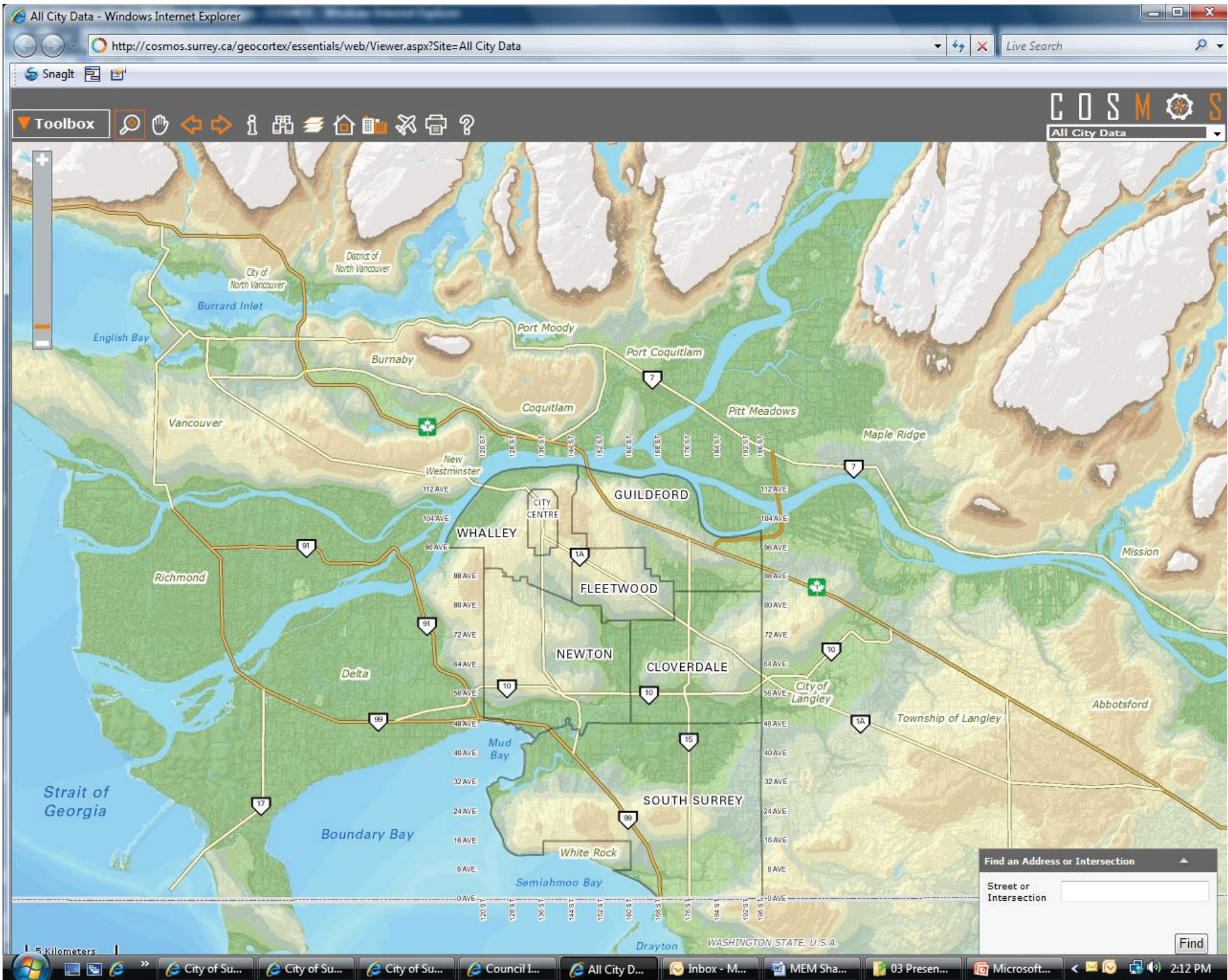


Case Study 14

Shared Drive Migration

Lois Enns

InterPARES 3 Project
3rd International Symposium
Vancouver, BC, Canada
29 May 2010



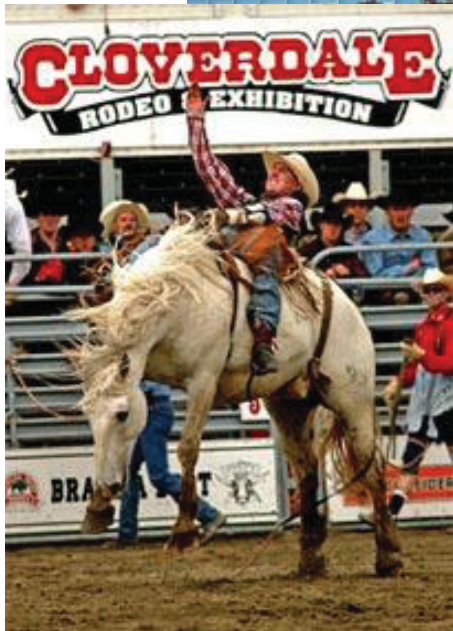
Surrey timeline

- 1879 Incorporated as a municipality
- 1974 Agriculture Land Reserve established
- 1993 Becomes a city
- 2008 Population reaches 452,000
 - Second largest city in BC
 - Twelfth largest in Canada
 - Growing at 1,000 people a month
- 2010 Participates as an Olympic venue city
- 2020 Becomes the largest city in the region

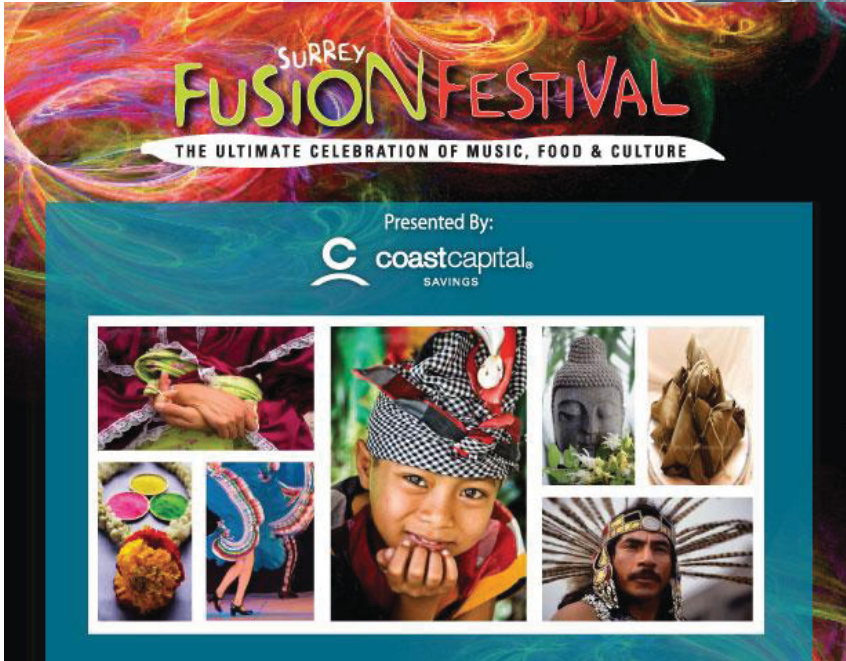
Organizational culture

- Low ratio of employees to citizens
 - 452,000 citizens: 3300 employees :1700 inside workers
- “Lean and mean”
 - Citizens want value for dollars
 - Employees are also citizens
- Stable environment
 - Same Mayor and Council for two terms (and longer)
 - Many long-term employees
 - Promotion from within
 - Cooperative union environment
- Tradition of a practical “journeyman” approach now overlaid with professionals

Yesterday and today



Today and tomorrow



Records environment

- 1966 First file plan adopted as policy
- 1979 Records Centre opens; microfilming begins
- 1992 Records retention by-law; word processing begins
- 1996 Provincial *Freedom of Information and Protection of Privacy Act*
- 1999 MOA functional classification adopted; first manual published
- 2000s Large database systems implemented
- 2005 Electronic records overtake paper; scanning program begins
- 2008 RM program renewal; ECM requirements and RFP completed
- 2010 Corporate Records By-law adopted; first ECM implementation

“Everything all at once”

- Establish a records program
 - Records Census
 - Corporate Records By-law
 - Corporate Records Manual (three volumes)
 - Build staff capacity (Records Centre, Central File Area)
 - Develop a corporate-wide training program (CBT)
- Contribute to the ECM project
 - Requirements, RFP, selection committee, Council Report, contract
 - Gap analysis, use case testing, design decisions, Model Office
 - Shared drive assessment and preparation for migration
 - Change management, user training, support
 - New maintenance activities (Information model, metadata model, permissions management, electronic disposition...)

Sub-cultures

- Eight departments, 31 divisions, 117 sections, 95 locations
 - City Managers
 - Corporate Records
 - Human Resources
 - Finance and Technology
 - Planning & Development
 - Engineering
 - Parks Recreation and Culture
 - Archives
 - Library
 - Fire Services

Corporate Records

- Pockets of RM compliance
- Paper and microfilm focus
- Decentralized for active records, centralized for semi-active
- Activities passed down from one clerk to another
- Records manager a new position (2008) required for e-records
- New positions on the horizon
 - Records analysts (2), permissions manager, business-side database admin, functional application analyst (1+1)
- Lead on the ECM project until recognized as a top-ten initiative
- Working “behind the curtain”
- Archives is a “community archives” run by Parks Rec and Culture
 - Community history with little to no involvement with other BUs

Information Technology

- Maintenance focus
- See themselves as corporate services
- Journeyman, promote from within, self-taught
- Many long-term employees
- Outsource project management and business analysis
- See ECM as an application rollout

Business Units

- Pockets of RM compliance
- Managers participate in authorization for destruction process
- Clerks participate in corporate records training
- High pain point with legacy records and especially stored drives
- Preparing for and implementing the ECM marks the first corporate-wide attempt to engage with BUs at the staff level on records management
- “Everything, all the time”
- Experiment in progress

Share Drive Migration

For the organization:

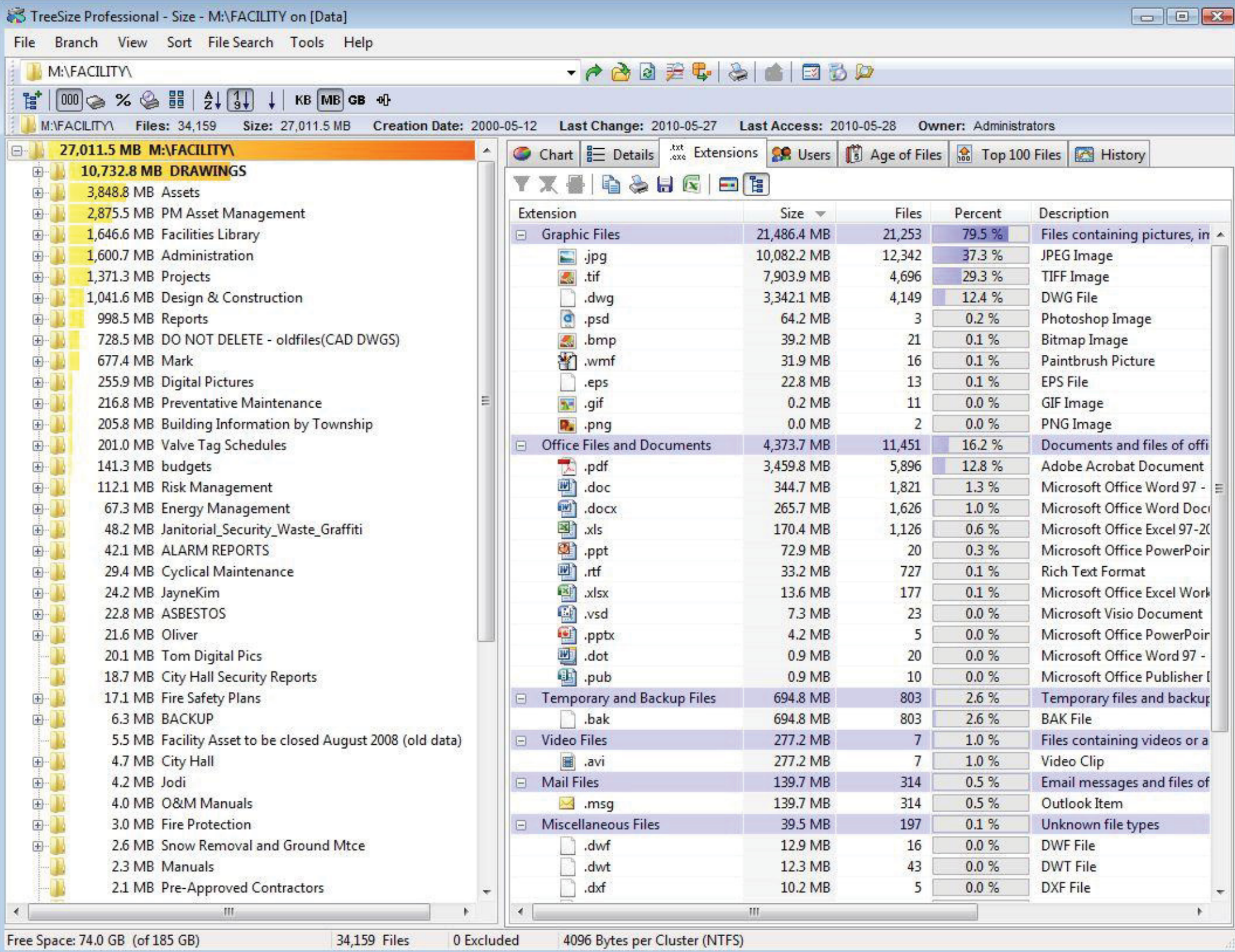
- Define the organizational context
- Define the technical context

For each business unit:

- Define the business context
 - Create Admin History, Records History, User History, Benchmarks
- Complete a business appraisal
 - Provide RM training program; build capacity; assess and sort records
- Complete a technical appraisal
 - Use new tools
- Prepare records for migration
 - Rename and classify – business case
- Migrate records
 - First round, differential, missing records, decommission drives, destroy backups...

Business Case for Share Care

- Legal
- Operational
- Administrative
- Financial
- Historic



M:\FACILITY\

M:\FACILITY\ Files: 34,159 Size: 27,011.5 MB Creation Date: 2000-05-12 Last Change: 2010-05-27 Last Access: 2010-05-28 Owner: Administrators

27,011.5 MB M:\FACILITY\

10,732.8 MB DRAWINGS

3,848.8 MB Assets

2,875.5 MB PM Asset Management

1,646.6 MB Facilities Library

1,600.7 MB Administration

1,371.3 MB Projects

1,041.6 MB Design & Construction

998.5 MB Reports

728.5 MB DO NOT DELETE - oldfiles(CAD DWGS)

677.4 MB Mark

255.9 MB Digital Pictures

216.8 MB Preventative Maintenance

205.8 MB Building Information by Township

201.0 MB Valve Tag Schedules

141.3 MB budgets

112.1 MB Risk Management

67.3 MB Energy Management

48.2 MB Janitorial_Security_Waste_Graffiti

42.1 MB ALARM REPORTS

29.4 MB Cyclical Maintenance

24.2 MB JayneKim

22.8 MB ASBESTOS

21.6 MB Oliver

20.1 MB Tom Digital Pics

18.7 MB City Hall Security Reports

17.1 MB Fire Safety Plans

6.3 MB BACKUP

5.5 MB Facility Asset to be closed August 2008 (old data)

4.7 MB City Hall

4.2 MB Jodi

4.0 MB O&M Manuals

3.0 MB Fire Protection

2.6 MB Snow Removal and Ground Mtce

2.3 MB Manuals

2.1 MB Pre-Approved Contractors

Name	Fil...	Size	Allocated	Percent
MH5	6,868	9,773.3 MB	9,786.8 MB	36.2 %
RWC	5,128	6,315.2 MB	6,325.2 MB	23.4 %
M1S	3,684	2,882.9 MB	2,889.9 MB	10.7 %
KAR	3,158	606.8 MB	613.0 MB	2.2 %
SEH	2,688	607.4 MB	612.5 MB	2.2 %
JK6	2,227	1,807.7 MB	1,812.0 MB	6.7 %
GDS	1,957	734.5 MB	738.2 MB	2.7 %
sryad5	1,534	509.7 MB	512.6 MB	1.9 %
S-1-5-21-2116825684-162391755...	1,484	476.5 MB	479.5 MB	1.8 %
KTN	1,456	1,437.7 MB	1,440.5 MB	5.3 %
LAA	1,216	282.4 MB	284.7 MB	1.0 %
gb3	529	679.2 MB	680.2 MB	2.5 %
OY1	388	21.6 MB	22.2 MB	0.1 %
DM4	334	238.1 MB	238.9 MB	0.9 %
Administrators	292	101.0 MB	101.6 MB	0.4 %
J7S	224	249.9 MB	250.3 MB	0.9 %
DGT	137	58.0 MB	58.3 MB	0.2 %
FA1	133	36.4 MB	36.6 MB	0.1 %
SAS	129	10.8 MB	11.0 MB	0.0 %
TW1	115	85.2 MB	85.5 MB	0.3 %
CMS	95	44.9 MB	45.1 MB	0.2 %
RSK	90	2.3 MB	2.4 MB	0.0 %
SKM	70	10.6 MB	10.7 MB	0.0 %
S-1-5-21-2116825684-162391755...	65	3.1 MB	3.2 MB	0.0 %
CFS	55	2.7 MB	2.8 MB	0.0 %
JLL	34	8.4 MB	8.5 MB	0.0 %
HARPINDERS	26	9.5 MB	9.5 MB	0.0 %
S-1-5-21-2116825684-162391755...	9	0.1 MB	0.1 MB	0.0 %
CS8	8	0.3 MB	0.3 MB	0.0 %



Search summary

Search Report

Search Complete with 0 error(s). [View log...](#)

Next, you have to review the search result.

Then, mark duplicate files for removal or archival
e.g. using SmartMarker.

Finally, recover valuable disk space by SaveSpace.

Limitation of number of files:

Free Edition: 100,000

Home Edition: 300,000

Enterprise Edition: unlimited

Duplicate files definition:

- Same File Content
(Byte-by-byte same content)
- Same File Extension
- Same File Size

Filtering Range:

Duplicate files statistics

This Session [All sessions](#)

Num of. items: 372 265157

Size of items: 7.33 MB 71.95 GB

[Tell my friends...](#)

[Smart Marker...](#) [SaveSpace...](#)

New Search

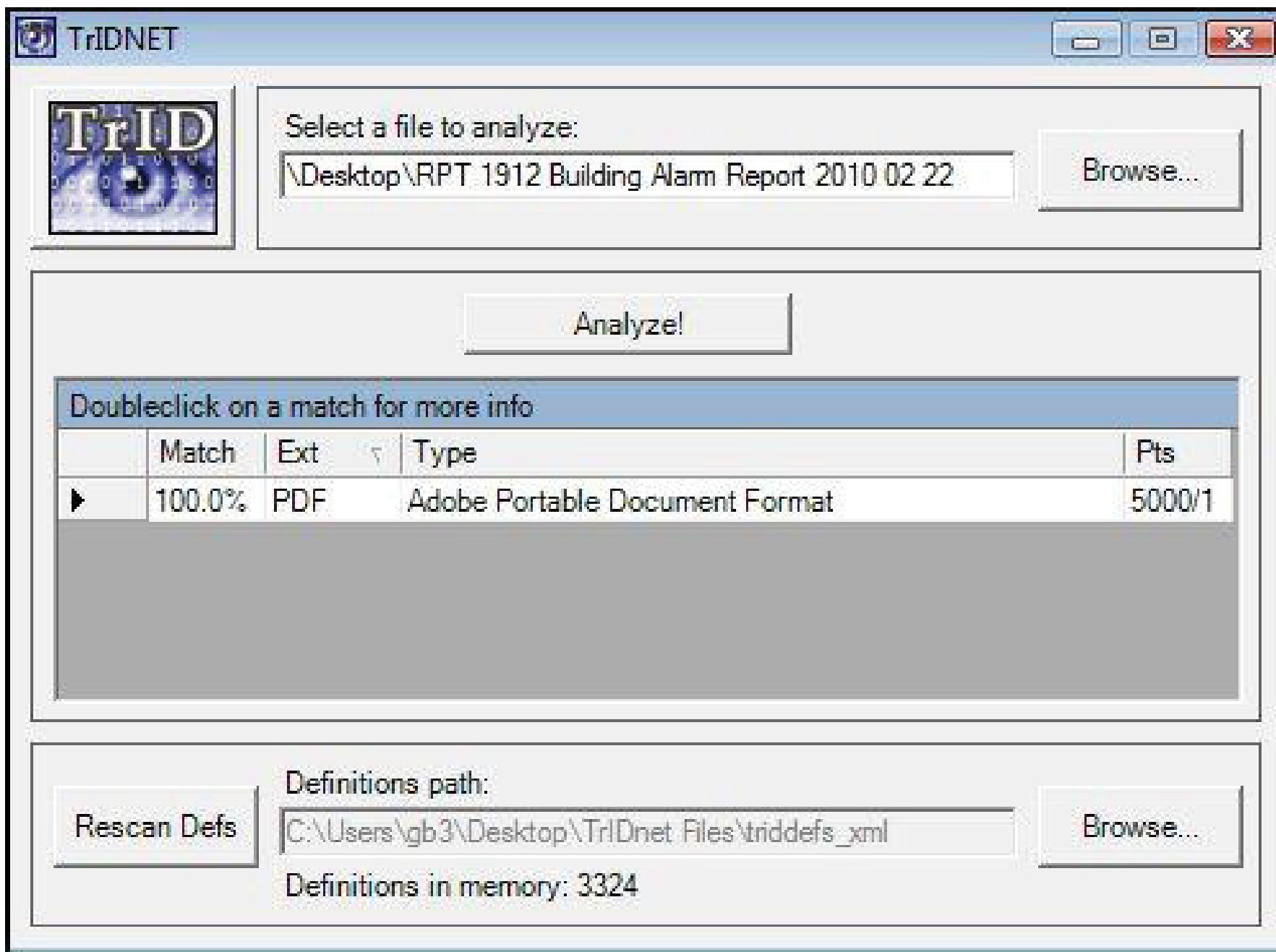
<<Back to Search

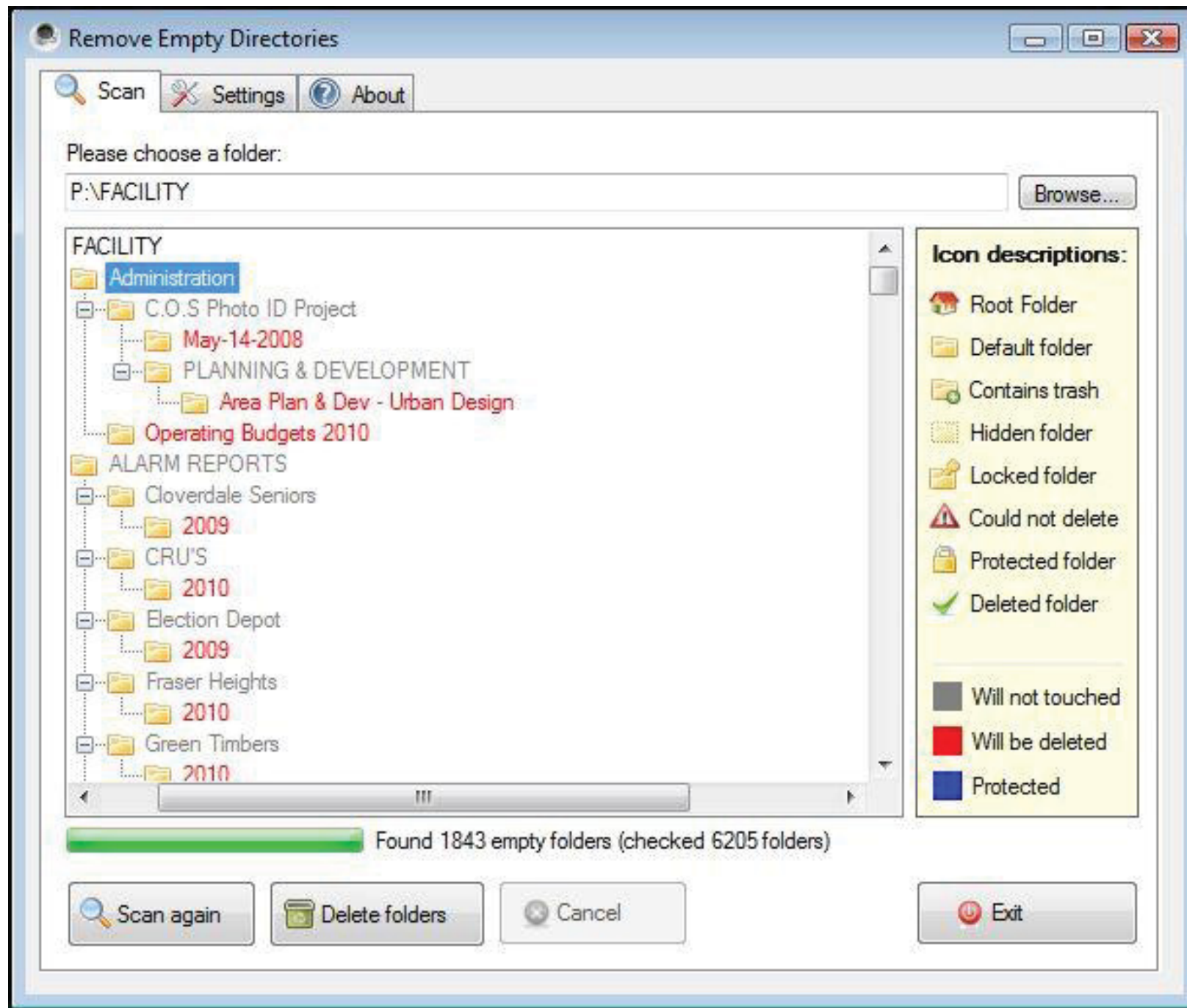
Main Panel

NoClone News Search Result

186 duplicate(s), 186 group(s), 372 files, 186 marked, 1 selected, max. 7.33 MB recoverable

Mark	Folder Path	File Name	File Size
☐	C:\Users\gb3\Desktop\TriDnet Files\triddefs_xml	aip.trid.xml	5243
☒	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive\testing duplicates\triddefs_xml	aip.trid.xml	5243
☒	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive\testing duplicates\triddefs_xml	amd.trid.xml	6956
☐	C:\Users\gb3\Desktop\TriDnet Files\triddefs_xml	amd.trid.xml	6956
☒	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive\testing duplicates\triddefs_xml	apl-acdsee.trid.xml	8582
☐	C:\Users\gb3\Desktop\TriDnet Files\triddefs_xml	apl-acdsee.trid.xml	8582
☒	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive\testing duplicates\triddefs_xml	approach9_5-apr...	9925
☐	C:\Users\gb3\Desktop\TriDnet Files\triddefs_xml	approach9_5-apr...	9925
☒	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive\testing duplicates\triddefs_xml	adaware_plugin.t...	12508
☐	C:\Users\gb3\Desktop\TriDnet Files\triddefs_xml	adaware_plugin.t...	12508
☐	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive\testing duplicates	DCT File Share S...	22103
☒	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive	DCT File Share S...	22103
☒	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive	M Drive Facility D...	25647
☐	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive\testing duplicates	NoCloneRemove...	25647
☒	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive	LST MSG Files.xlsx	32077
☐	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive\testing duplicates	LST Date Create...	32077
☒	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive\testing duplicates\triddefs_xml	anb-c.trid.xml	34003
☐	C:\Users\gb3\Desktop\TriDnet Files\triddefs_xml	anb-c.trid.xml	34003
☒	C:\Users\gb3\Desktop\Old PoC Stuff	R9 from DOpus.c...	884496
☐	C:\Users\gb3\Desktop\Old PoC Stuff\PoC	R9 from DOpus.c...	884496
☒	C:\Users\gb3\Desktop\Old PoC Stuff\PoC	Final Output 2.CSV	1313979
☐	C:\Users\gb3\Desktop\Old PoC Stuff\PoC\DUPLICATES	Final Output 2.CSV	1313979
☐	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive\testing duplicates	LST Date Create...	5159720
☒	C:\Users\gb3\Desktop\Old PoC Stuff\Files from the L Drive	LST Date Create...	5159720





P:\FACILITY\ALARM REPORTS\1912\2010

File Edit View Go Favorites FTP Settings Tools Help

Styles: Commander Dual Horizontal Dual Vertical Explorer Filmstrip Images Single

Folder Tree

- Whalley Library
- Whalley Seniors Centre
- 0775-20
- 0775-30
- COPY 2 (M:)
- net-apps (\\sysserver1) (N:)
- COPY 3-PoC (P:)
- FACILITY
 - Administration
 - ALARM REPORTS
 - 1912
 - 2007
 - 2008
 - 2009
 - 2010
 - Administration
 - BC Pavilion
 - Cloverdale Ice Arena
 - Cloverdale Library
 - Cloverdale Rec
 - Cloverdale Seniors
 - Cloverdale Youth
 - CRU'S
 - Election Depot
 - Fleetwood Library
 - Fleetwood Rec
 - Fraser Heights
 - Green Timbers
 - Guildford Library
 - Guildford Rec
 - Hemlock Works Yard
 - Hjorth Road Pool
 - Kensington Prairie Elementary
 - Kwantlen Pool
 - Museum
 - Newton Ice Arena

P:\FACILITY\ALARM REPORTS\1912\2010

Name	Description	Type	Modified	Attr
RPT 1912 Building Alarm Report 2010 01 21.pdf	0740-30-1912 Bulding	Adobe Acrobat Docu...	2007-04-17 11:53 AM	-a---
RPT 1912 Building Alarm Report 2010 05 12.pdf	0740-30-1912 Bulding	Adobe Acrobat Docu...	2007-04-17 11:53 AM	-a---
RPT 1912 Building Alarm Report 2010 06 14.pdf	0740-30-1912 Bulding	Adobe Acrobat Docu...	2007-04-17 11:52 AM	-a---

Set Description - Directory Opus

Enter description for 'RPT 1912 Building Alarm Repor...':

0740-30-1912 Bulding

☐ Set this description for files within selected folders

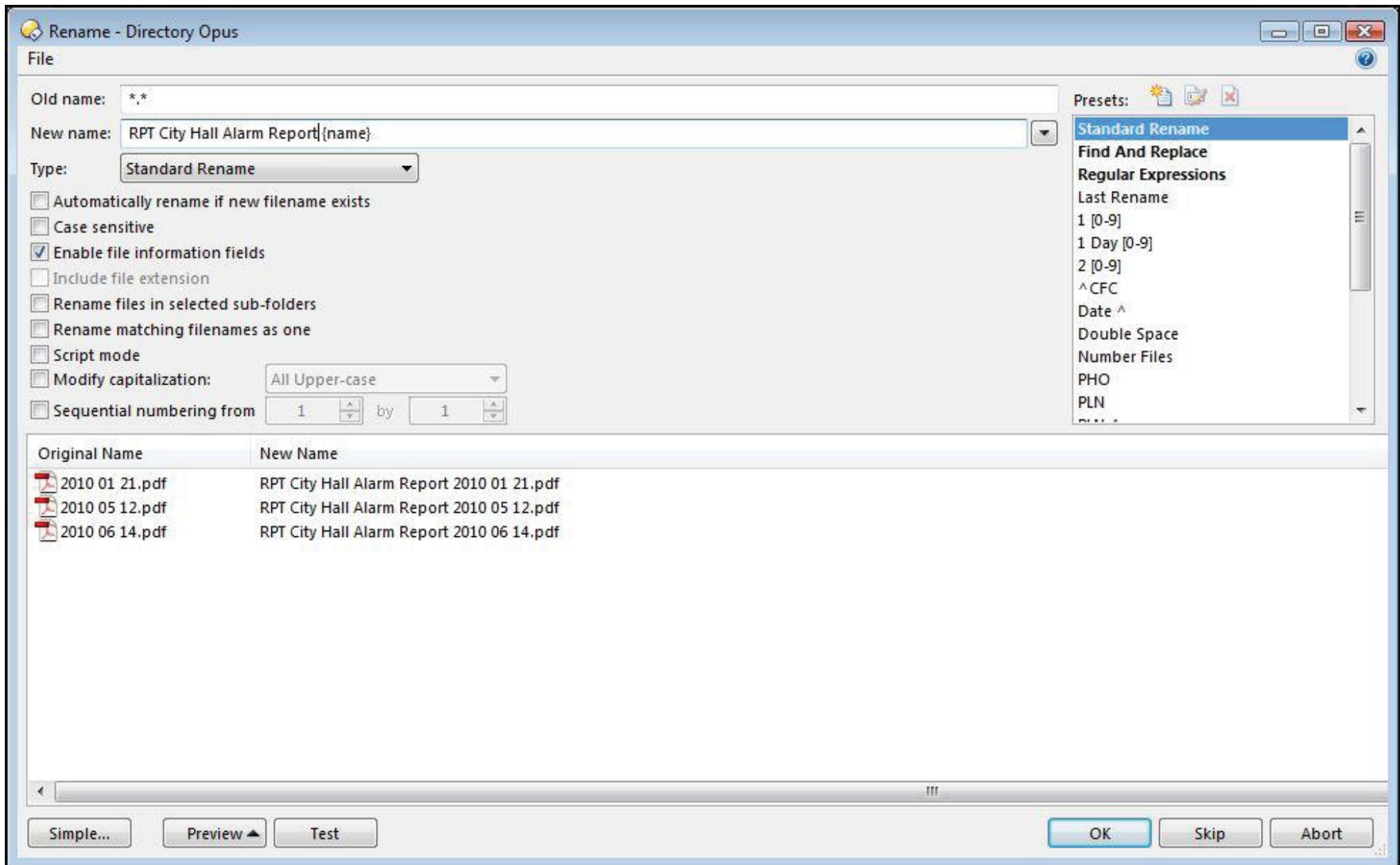
OK To All OK Cancel

Location Computer > P: > FACILITY > ALARM REPORTS > 1912 > 2010 >

Content Type <Disabled>

0/0 folders, 0/3 files, 0 bytes selected

61% full, 74 GB free SOURCE



End