Case Study 14
Shared Drive Migration

Lois Enns

InterPARES 3 Project

3rd International Symposium

Vancouver, BC, Canada

29 May 2010

http://cosmos.surrey.ca/geocortex/essentials/web/Viewer.aspx?Site=All City Data

Live Search

SnagIt

▼Toolbox

COSMOS

All City Data

City of North Vancouver

District of North Vancouver

Burrard Inlet

English Bay

Port Moody

Burnaby

Port Coquitlam

Vancouver

Coquitlam

Pitt Meadows

Maple Ridge

New Westminster

112 AVE

GUILDFORD

104 AVE

Mission

CITY CENTRE

WHALLEY

104 AVE

91

96 AVE

96 AVE

1A

88 AVE

88 AVE

FLEETWOOD

Richmond

80 AVE

80 AVE

91

72 AVE

72 AVE

10

NEWTON

CLOVERDALE

64 AVE

64 AVE

Delta

56 AVE

10

10

56 AVE

City of Langley

Township of Langley

Abbotsford

99

48 AVE

48 AVE

1A

40 AVE

15

40 AVE

Mud Bay

32 AVE

32 AVE

17

SOUTH SURREY

24 AVE

24 AVE

99

Boundary Bay

16 AVE

16 AVE

White Rock

8 AVE

8 AVE

Semiahmoo Bay

0 AVE

0 AVE

Strait of Georgia

120 ST 128 ST 136 ST 144 ST 152 ST 160 ST 168 ST 176 ST 184 ST 192 ST 196 ST

Find an Address or Intersection

Street or Intersection

Find

5 Kilometers

Drayton

WASHINGTON STATE, U.S.A.

City of Su... City of Su... City of Su... Council I... All City D... Inbox - M... MEM Sha... 03 Presen... Microsoft...

2:12 PM

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

4

Yesterday and today

Today and tomorrow

CITY HALL, OFFICE and SIMON FRASER UNIVERSITY

PERFORMING ARTS CENTRE
CENTRAL LIBRARY and
HOTEL / OFFICE TOWER

SKYTRAIN STATION and
BUS TRANSIT EXCHANGE

CITY OF SURREY

CENTRAL CITY

SURREY FUSION FESTIVAL
THE ULTIMATE CELEBRATION OF MUSIC, FOOD & CULTURE

Presented By:
coast capital SAVINGS

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
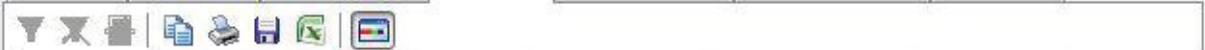   - First round, differential, missing records, decommission drives, destroy backups…

Business Case for Share Care

- Legal
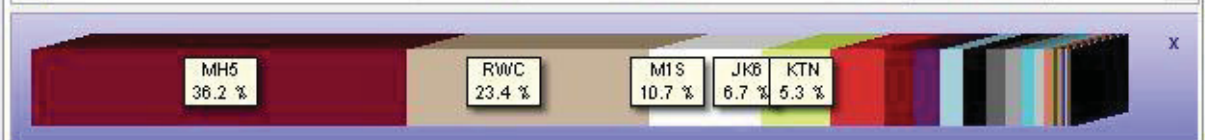- Operational
- Administrative
- Financial
- Historic

TreeSize Professional - Size - M:\FACILITY on [Data]

File Branch View Sort File Search Tools Help

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	

Chart | Details | Extensions | Users | Age of Files | Top 100 Files | History

Extension	Size ▼	Files	Percent	Description
Graphic Files	21,486.4 MB	21,253	79.5 %	Files containing pictures, in
.jpg	10,082.2 MB	12,342	37.3 %	JPEG Image
.tif	7,903.9 MB	4,696	29.3 %	TIFF Image
.dwg	3,342.1 MB	4,149	12.4 %	DWG File
.psd	64.2 MB	3	0.2 %	Photoshop Image
.bmp	39.2 MB	21	0.1 %	Bitmap Image
.wmf	31.9 MB	16	0.1 %	Paintbrush Picture
.eps	22.8 MB	13	0.1 %	EPS File
.gif	0.2 MB	11	0.0 %	GIF Image
.png	0.0 MB	2	0.0 %	PNG Image
Office Files and Documents	4,373.7 MB	11,451	16.2 %	Documents and files of offi
.pdf	3,459.8 MB	5,896	12.8 %	Adobe Acrobat Document
.doc	344.7 MB	1,821	1.3 %	Microsoft Office Word 97 -
.docx	265.7 MB	1,626	1.0 %	Microsoft Office Word Doc
.xls	170.4 MB	1,126	0.6 %	Microsoft Office Excel 97-20
.ppt	72.9 MB	20	0.3 %	Microsoft Office PowerPoin
.rtf	33.2 MB	727	0.1 %	Rich Text Format
.xlsx	13.6 MB	177	0.1 %	Microsoft Office Excel Work
.vsd	7.3 MB	23	0.0 %	Microsoft Visio Document
.pptx	4.2 MB	5	0.0 %	Microsoft Office PowerPoin
.dot	0.9 MB	20	0.0 %	Microsoft Office Word 97 -
.pub	0.9 MB	10	0.0 %	Microsoft Office Publisher
Temporary and Backup Files	694.8 MB	803	2.6 %	Temporary files and backup
.bak	694.8 MB	803	2.6 %	BAK File
Video Files	277.2 MB	7	1.0 %	Files containing videos or a
.avi	277.2 MB	7	1.0 %	Video Clip
Mail Files	139.7 MB	314	0.5 %	Email messages and files of
.msg	139.7 MB	314	0.5 %	Outlook Item
Miscellaneous Files	39.5 MB	197	0.1 %	Unknown file types
.dwf	12.9 MB	16	0.0 %	DWF File
.dwt	12.3 MB	43	0.0 %	DWT File
.dxf	10.2 MB	5	0.0 %	DXF File

Free Space: 74.0 GB (of 185 GB)   34,159 Files   0 Excluded   4096 Bytes per Cluster (NTFS)

File   Branch   View   Sort   File Search   Tools   Help

M:\FACILITY\

KB MB GB

| 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

Size	Folder
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

Chart   Details   Extensions   **Users**   Age of Files   Top 100 Files   History

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 %

| MH5 36.2 % | RWC 23.4 % | M1S 10.7 % | JK6 6.7 % | KTN 5.3 % |

Reasonable NoClone 2007

Search Session   Review   Mark   Actions   Help   Buy Now

🔍 Search   ✏ Smart Marker   ✖ SaveSpace   📄

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 Smarker Marker.
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

Marke	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

00:00:24.9902913 elapsed.
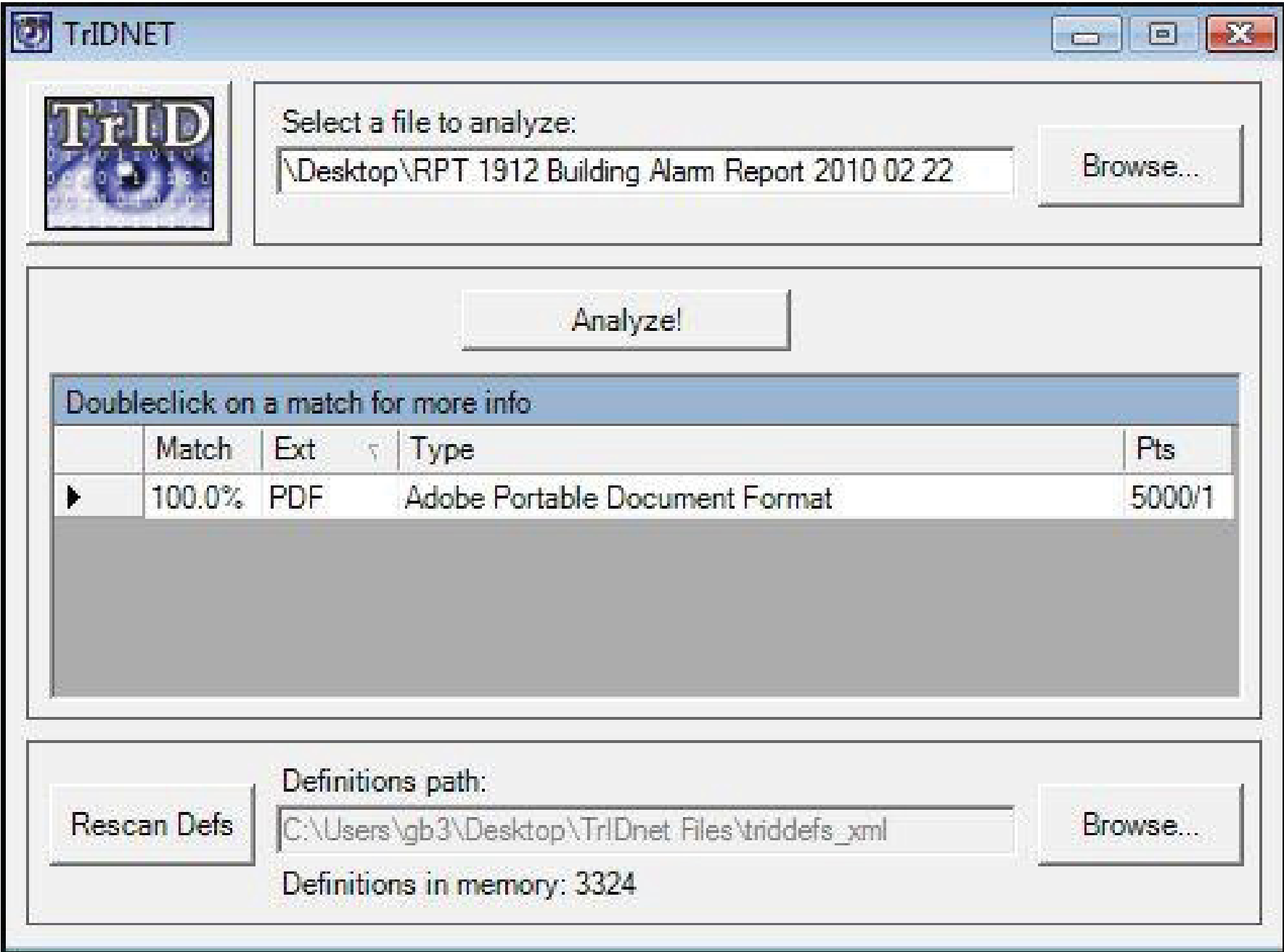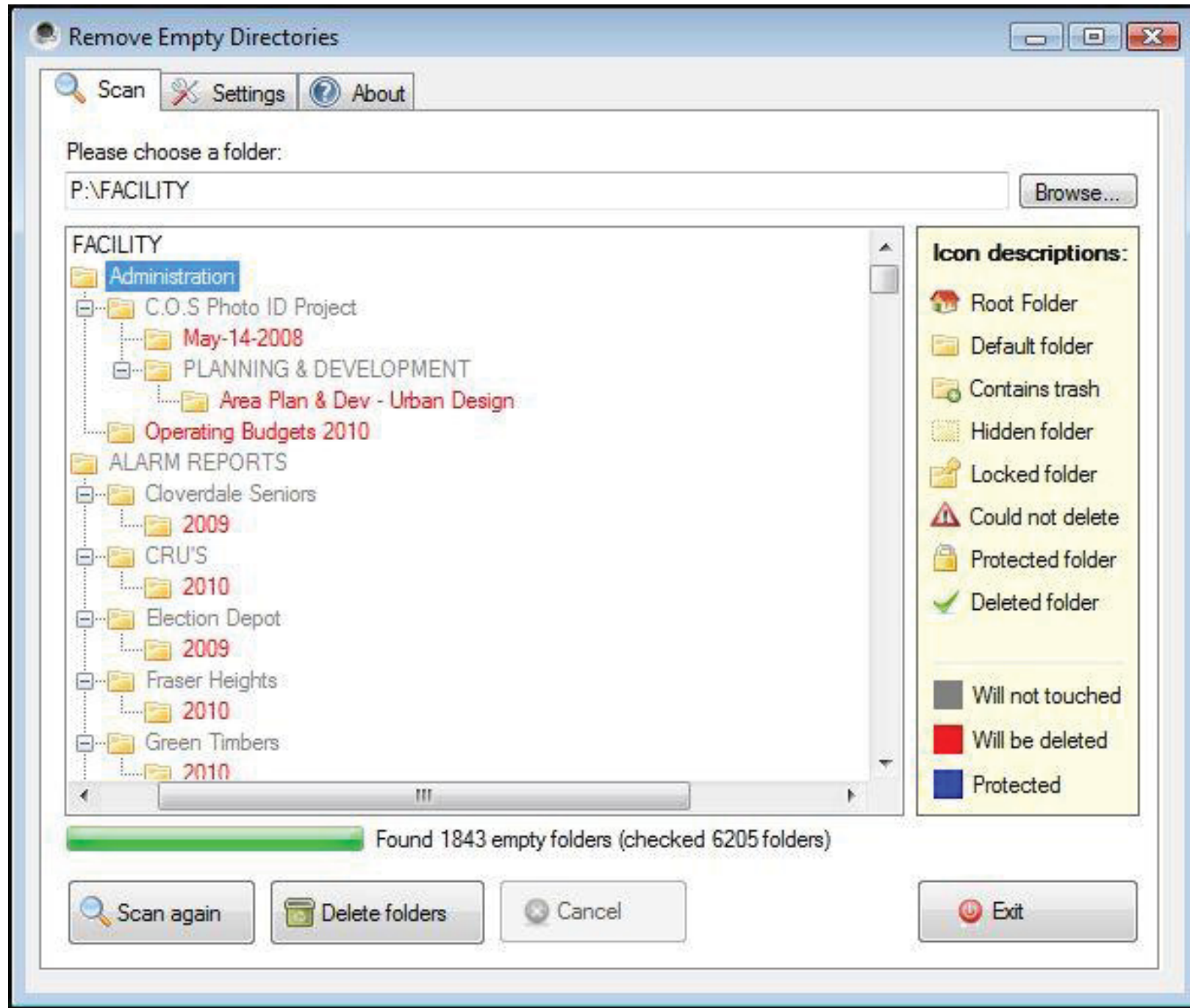
File   Edit   View   Go   Favorites   FTP   Settings   Tools   Help

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

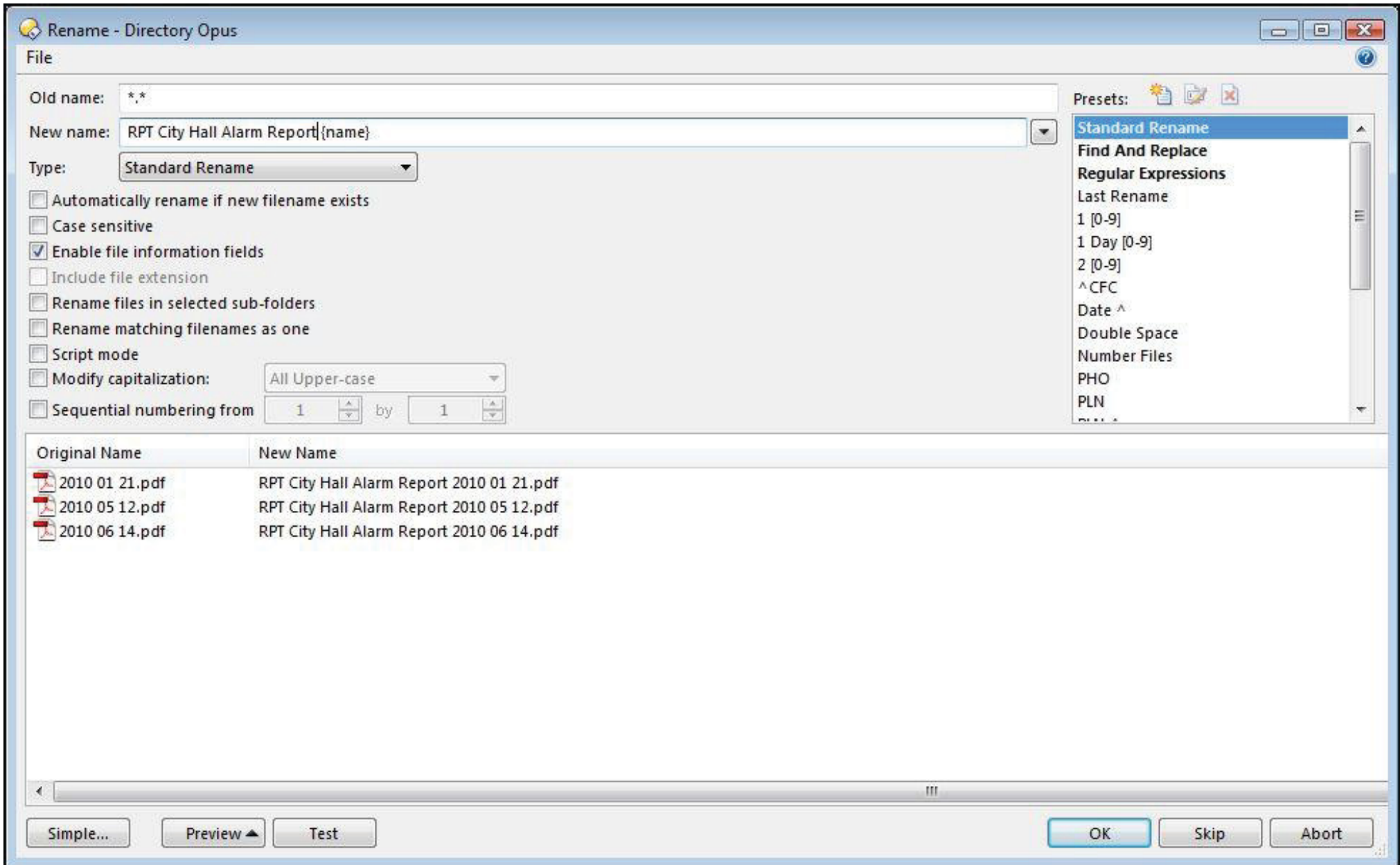☐ Set this description for files within selected folders

[OK To All]   [OK]   [Cancel]

2010

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