One Year into the NHPRC's State Electronic Records Grant Program

Wisconsin Historical Society (WHS)

Umm…guys… I don't know about this...

What is it?

Wisconsin State Preservation of Electronic Records Project (WiSPER) seeks to implement a sustainable electronic records workflow and transfer management system in selected state agencies producing a measurable increase in the preservation of, and research access to, state agency records with historic value.

Goals…

- Increase the percentage of scheduled state agency electronic records with historic value that are transferred to the WHS.

- Document the processes and tools used to identify and schedule electronic records, sort through agency "network drive attics," develop transfer workflows, and train employees in electronic records governance best practices.

- Improve discovery and access to electronic records in the repository through the development of links from cataloged series and web-based access points to records collections.

Key Project Pieces

- Content transfer and acquisition

- Implementation of BitCurator

- Preservica development

- Testing of the Versatile E-Module

- Access via Preservica to ExLibris Alma

Who?

- Wisconsin Historical Society (WHS)
  (The Guinea Pigs)

- Governor's Office (GOV)

- Department of Workforce
  Development (DWD)

- Department of Natural
  Resources (DNR)

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Areas of Focus

- WHS: shared drives, testing policies/procedures internally before rolling out to partners

- GOV: email/.psts , restricted access, template/structure for incoming administrations

- DWD: shared drives, SharePoint content, and email/.psts

- DNR: workflows related to preservation of long-term e-records

What We've Done so Far…

WHS

Initial Actions:

- Institutional evaluation of personal drives for Library/Archives
- Orphan location
- Format migrations

The Products:

- Inventory
- TreeSize reports showing reduction of files/folders

Shared Drives: Inventory

Folder Name	General Summary of Contents	Assigned To	Proposed disposition	Final Disposition
AEB	Current Personal Files	Keep	Keep	Keep
AJB	Current Personal Files	Keep	Keep	Keep
AJN	Current Personal Files	Keep	Keep	Keep
AJS	Current Personal Files	Keep	Keep	Keep
Andrea	Project files for Lynda Barry and Emile Quiner	Michael E.	Keep and transfer	Deleted
AWK	Current Personal Files	Keep	Keep	Keep
AXD	Current Personal Files (but empty)	Mullen	Evaluate	Deleted
AXJ	Current Personal Files (but empty)	Keep	Keep	Keep
BB3	Ben Brewster M: drive - Lots of older/odd formats	Huelsbeck	Evaluate and delete	Deleted
CAB	Current Personal Files	Keep	Keep	Keep
CBJ	Current Personal Files	Keep	Keep	Keep
cd1	Collection of Manuscript abstracts, EADs, inventories, arrangements	Krause	Evaluate	Deleted
CIRC	Lots of folders, but not much content. Much is likely out of date	Hemming	Evaluate	Deleted
CM4	No real content	Knies	Evaluate	Deleted
CM8	Personal Drive	Krause/Knies		TBD
CMM	Several Accessions/Appraisals that were apparently printed out	Snyder		Deleted

You want me to do what….?

What's Next-WHS

- Staff beginning work in shared drives
- Training (what is a record, schedule, RDA, etc…)
- Creating processes
- Deduplication
- Reorganization
- Training and processes in place

GOV

Action: Evaluate/Describe/Record Processes

The Products:

- Workflows (.psts, personal folders, shared folders, paper)
- Records Officer Employee Tracker
- RDA Cheatsheet

GOV-Workflows

GOV-Employee Tracker

GOV-RDA Cheatsheet

GOV-Next Steps

- Policy Department: How to tackle the issue of differing timeframes for transfer among email, personal drives, shared drives, and paper records (Central/subject files..)

- Communications Department: Create binders, but also have (electronically) different pieces of the completed binders scattered

- Identifying owners of the "official" record

- Formats/naming conventions

- Governor's Residence RDA

DWD

- One of the largest state agencies in Wisconsin
- Grant focus is smaller (Secretaries Office) to start with…
- Records Officer is extremely engaged in records management and already actively working on organization
- Grant beginning with drive review

DWD

DWD

DWD-Next Steps

- Backtrack to idea of centrally located subject files
- Begin transfer of RDA's ready to come to WHS
- Continue work on naming conventions
- Tackle SharePoint content
- Potential use of GOV workflows

Tools in Use

- Excel

- TreeSize: http://download.cnet.com/TreeSize-Free/3000-2248_4-10139400.html

- Advanced Renamer: https://www.advancedrenamer.com/download

- Deduplication Software:
  - Auslogics Duplicate File Finder: http://www.auslogics.com/en/software/duplicate-file-finder
  - Similar Images: http://similarimages.en.softonic.com/
  - VisiPics: http://www.visipics.info/index.php?title=Main_Page

Tasks (General)

- Using TRAC (not necessarily to become certified) but to create a master list of policies and procedures that we need to create, update, or put in place

- We have begun researching, creating, and formalizing several of these documents:
  - File formats
  - Tools guide
  - Naming conventions
  - Redaction policy
  - Access Policy

Thank you!

Feel free to contact us!

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