



Shared Drive Cleanup Lessons Learned

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Redundant, outdated, and trivial information is filling up organizations' shared drives, creating unnecessary risks, driving up costs, and making it difficult to find information. Five organizations reveal why and how they cleaned up or plan to clean up their shared drives.



Agenda

- Introduction to topic
- ConocoPhillips case study
- CITGO case study
- Shell case study
- Lessons learned for a successful shared drive cleanup project

What we asked panelists

1. What drove the company to take on shared drive cleanup?
2. Who participated?
3. Was there a pilot?
4. Were automated tools used?
5. How long did the cleanup take?
6. How will the cleaned-up state be sustained?

Beverly Harris, MBA
Documents & Data Services Team,
ConocoPhillips

Share Drive Cleanup Overview

- What Drove ConocoPhillips to take on the Project?

- Need to restrict access
- Standard BU folder Structure

- Which Business Functions Participated?

Regulatory

Finance

Development

Completions

Reservoir Engineering

Land

Drilling

Facilities/Projects

Share Drive Cleanup Implementation

- Was there a "Pilot?"
 - Smallest function used as pilot
 - Implemented Lessons Learned
- Were Automated Tools Used?
 - RoboCopy
 - ViceVersa

Share Drive Cleanup Results

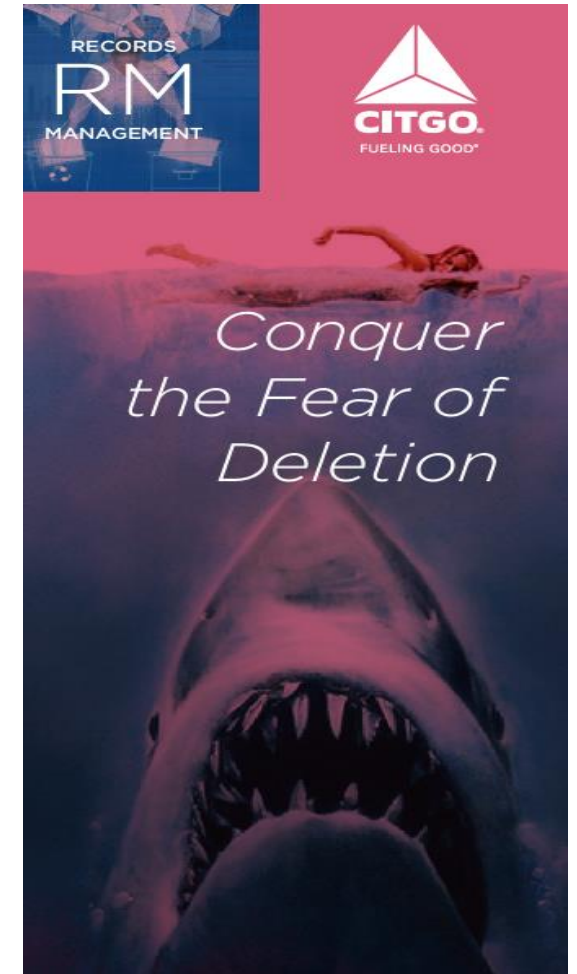
- How Long Did the Cleanup Take?
 - Project lasted 6 months
 - All Business Functions Successfully Migrated
 - View Access to Old Data for 90 Days
 - Data Archived

- How Will the Cleaned-Up State be Sustained?
 - Role of Records Coordinators
 - Role of Business Personnel

Ellie Maier, CRM, CBCP
Corporate Records Manager, CITGO

Share Drive Cleanup Overview

- What Drove CITGO to take on the Project?
 - General ROT (redundant, outdated, trivial) Cleanup
 - Detox your Inbox Workshop Lunch & Learn
 - Office Spring Cleaning Consultations
- Which Departments Participated?
 - Company-Wide including the Field
 - Formal project plans as well as informal guidance



Share Drive Cleanup Implementation

- **Was there a "Pilot?"**
 - Yes, but with one Department at a time for training purposes
 - Built on earlier training courses and associated projects
- **Were Automated Tools Used?**
 - Collaborative efforts based on the need to control and document deletions
 - RoboCopy for de-duplication tasks only and limited application

Share Drive Cleanup Results

- How Long Did the Cleanup Take?
 - Projects continue as they are needed
 - No deadline imposed to fit BU schedules
- How Will the Cleaned-Up State be Sustained?
 - Departmental performance review RIM objectives;
 - RIM Compliance Certificates



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* "RIM" = Records & Information Management

Debra Mestemaker, CRM, ERMm, CIP
DS Global IM Compliance Manager, Shell

Shared Drive Cleanup Lessons (to be) Learned

Share Drive Cleanup Overview

- What is driving Shell to take on the Project?
 - Shared Drive data is largely unmanaged creating business risk
 - Identify and properly store Records and Information of Value
 - Mitigate risk of mismanaging personal data (GDPR)
 - Remove ROT to improve information findability
 - Leverage more efficient/less expensive storage options
- Which Business Functions will participate?
 - All businesses and functions will participate, a phased approach will be taken



Share Drive Cleanup Implementation

- Will there be a “Pilot?”
 - Pilot groups selected
 - Early adopter criteria established
 - Content is known/well organized/clear ownership
 - Schedule for remainder of the organization is being developed
 - Abandoned drives will require special handling
- Will automated tools be used?
 - Use of analytics tools is essential
 - Tool assessment underway
 - TreeSize – Clearwell - Everteam – Nuix – Cortical
 - Capax - IBM StoredIQ - Active Navigation



Share Drive Cleanup Results

- How long will the cleanup take?
 - Current estimate is 12-18 months
 - Outcome of pilot will inform plans
 - Agile methodology will be employed



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- How will the cleaned-up state be sustained?
 - Incorporate use of appropriate tools in the overall IM/RM program
 - Shared drive access will be restricted, tighter controls on use

Recommended Practices for Shared Drive Cleanup

Lessons Learned for a Successful Project

1. Build a collaborative alliance with a multidisciplinary team comprised of IM, IT, and the impacted business units
2. Make sure that governance (policies, processes, and supporting framework, including enforcement) and a consistent cleanup process are in place to support defensible destruction
3. Use automated tools where feasible to analyze info stored on a shared drive and for prioritizing it for cleanup
4. Expect some level of manual intervention to do the actual cleanup and migration (still no Magic Bullet)

Shared Drive Cleanup Lessons Learned

ARMA Houston, January 23, 2019

