

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

Wisconsin Historical Society (WHS)



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.



Who?

- Wisconsin Historical Society (WHS)
(The Guinea Pigs)
- Governor's Office (GOV)
- Department of Workforce
Development (DWD)
- Department of Natural
Resources (DNR)



Key Project Pieces

- ✓ State Agency e-record identification and management
- ✓✓ Content transfer and acquisition from agencies
- ✓✓✓ E-Records management testing at the agency level
- ✓✓ Repository development (Preservica)
- ✓ Access to state records via Preservica / Catalog

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



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

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 Much is likely out of date	Hemming	Evaluate	Deleted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

(complete)

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-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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What We've Done so Far...

