



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Redundant, outdated, and trivial information is filling up organizations' shared drives, creating unnecessary risks, driving up costs, and making it difficult to find information.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.



Shared Drive Cleanup - Lessons Learned

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Shared Drive Cleanup Lessons Learned

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Today's Agenda

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

What We Asked Study Participants

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

Completions

Drilling

Finance

Reservoir Engineering

Facilities/Projects

Development

Land

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 six 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

Dave Foley
Director Records and Information
Management, ONEOK

Shared Drive Cleanup - Overview

Begin with **WHY**

- Explain **HOW** to accomplish
- Finish with **WHAT** to expect or what will result

A proactive approach during RIM program rollout

- Cleanup is not a standalone driver
- Becomes an 'awareness' activity
- Automation scans file names & paths
- Analysis used to build file plan
- Create file (re)organization and cleanup tasks for business unit's (RIM) improvement plan

Share Drive Cleanup Overview

What drove ONEOK to take on shared drive cleanup?

1. A natural fit with a key component of my RIM program strategy
"Integrate processes for effectiveness, automate for efficiencies"
2. A condition managed to the records retention schedule"
"... deleted for RIM policy compliance, "all company records are..."
"... & destroyed when met retention and not on a hold order"
3. Requisite before migrating to the enterprise content management system
 - File planning
 - Data cleanup
 - Data migration
 - Security and access

Shared Drive Cleanup - HOW

Which business functions participated?

- Followed the “eat your own dog food” theory
- EVP is the executive sponsor; began within same EVP reporting structure (IT, HR, DR, Admin Services, RIM)

Was there a pilot?

- Began with RIM and admin services
- Quickly moved to other business areas

Were automated tools used?

- Where useful for drive / folder / file analysis

Shared Drive Cleanup - WHAT

How will the cleaned-up state be sustained?

- RIM helps business build...
 - File plan for the cleanup & (re)org and migration to content management system
 - Improvement plan to track and report progress
- Annual accountability report at the VP level
 - Place awareness and accountability into business owning information
 - Chart self-assessments of RIM policy compliance
 - Business improvement plans

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



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)

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