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# How Do You Eat An Elephant?

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# How Do You Eat An Elephant?

Yea...never mind...  
Lets just ask how do you hug an elephant  
because this fella is too cute to eat!



# Agenda

- Legacy issues
- Pre-work and food for thought
- What exactly are we looking for?
- Help your electronic & physical records get along
- Inventory Records
- Audit Physical against Digital  
Correct and Update
- Move
- Data Migration
- Be familiar with your data
- How does this look afterwards?
- The Initial Outcome
- The Totals
- Questions



# Legacy Issues

As RM practices have evolved legacy records have been left behind. These records pose substantial issues when it comes to the integrity of an RM program. Some issues include;

- Data has not been migrated forward from one system to another
- Some fields in your application were created after the records came into your holdings and are captured incorrectly
- Some data from the legacy records may not be present at all
- Some data may not even be captured because functions were not available



# Pre-work And Food For Thought

## Questions that need to be answered prior to beginning

- How were records tracked prior to the electronic system?
- Where are those records located?
- Can a report be generated to show what is currently checked out prior to the move?
- If paper records were used to track records and that data is not in the electronic system, is hiring a person to transition the data on hard copy into the electronic system currently a priority or can it wait?



# What Exactly Are We Looking For?

## Electronic Integrity

- Full descriptions of each box
- Full sets of data for each field in your system
- What data do we currently have that has integrity
- What data do we currently have that does not have integrity
- What data are we missing completely
- Where are our system's weak spots when it comes to legacy records
- Does our electronic system meet the needs of our new storage location?
- Does that need to be addressed prior to the move?
- Will our new location hold both paper and cold storage media? ***If not, those records will need to be identified and auditable in the electronic system***
- Do we need to add fields in the system to accommodate a more thorough set of data?

# Help Your Electronic & Physical Records Get Along

## Matching Sides

Electronic data and your physical records should match up through



- The appropriate fields in your system to capture data
- An adequate inventory of the physical records to populate those fields

Don't forget lengthy descriptions or finding aids

# Inventory Records

## Ask yourself the following

- I. What kinds of media do we have?
- II. How should that media be stored?
- III. Who owns these records?
- IV. What is Corporate and what is Federal?
- V. How much of each media type do we have?
- VI. Do we know the exact location of each record?

## Electronic Labor

- Create reports in your system to show how the data currently looks
- Run queries and make global changes on easily recognizable discrepancies
- Key word searches to identify incorrectly marked entries (example- incorrect media types)
- Identify holdings using the same data as the manual labor side to compare later on

# Audit Physical Against Digital

## Manual Labor

For data that does not appear to be correct or that you are unsure of, manual checks are necessary

- Comparing reports against physical records will be necessary to ensure the integrity of the data in your system.
- Touching everything is not necessary at this point, but will help later on during the move of records.
- Make sure that the data is updated in your system to reflect what you find on your manual labor audit of the digital inventory.
- Manual counts may also be necessary

# Correct And Update Data

## Team Work!



Team work is **HUGE** when it comes to correcting data.

- Quality checks on updates are necessary
- Many hands make light work
- A small team can do more than you imagine!
- Let the electronic system work for you!

# Move

Take this opportunity to touch EVERYTHING!

- For large holdings this may be the one time that you will have the man power and the project plan to do a full inventory.
- Gather all of the data that you can from each box as they move. For example;
  - A. *Make sure the media type is correct*
  - B. *Make sure the box type is correct*
  - C. *Make sure that what is moving are actually records*

Take that data and compare it to the data that is in your current system. If there are inconsistencies, this is the time to correct them!

# Data Migration

**Some days all you can do is bury your head**



# Data Migration

## Use Tools To Cut Down On Manual Data Entry

- Know your current system very well and make it work for you
- Barcodes
- Hand scanners
- Programs designed to assist are out there and can be justified by pointing out the benefits of less data entry error



# Be Familiar With Your Data

## Know how good data looks on both your tools and system

- Understand how your good data looks on the tools that you are using
- Screen shot or take pictures of that good data for training modules
- Keep a close eye out for errors during migration

## Know how to recognize bad data and what causes it

Sometimes bad data can be an addition to the number sequence

- A symbol thrown in the mix
- A space in the sequence
- An additional number
- A letter

Screen shot or take pictures of that good data for training modules

## What causes this?

- Poor quality ink or labels
- ripples in the printer ribbon
- Ink bleeding into the overlay

# Success!



# How Does This Look Afterwards?

## Inventory Presented

- Duplicate descriptions
- No descriptions
- Missing data
- Legacy migration impact on the electronic system
- Incorrect data such as incorrect media type or box type

## Mitigations

- All boxes that were identified with no or duplicate descriptions were returned to the owner to inventory
- Missing data was entered
- Old messy data that did not migrate correctly was corrected and cleaned up
- New fields were created to allow for a more in depth knowledge of our holdings

# The Initial Outcome

## Identified

- Over 800 entries with duplicate or no descriptions (85% corrected currently)
- Over 2500 boxes identified as mixed media boxes (new field created)
- Manual counts clarified totals of specific box types that were bundled (several thousand boxes identified as opposed to a couple of hundred as indicated in the electronic system and several new fields were created)

## What changed

- The look of our system as fields were added to capture information about our holdings
- Processes changed as to how and what we accept as new records into holdings
- For the first time, we have a true understanding of our holdings
- Integrity of our program is enhanced due to all of the above

# The Totals

## Through the inventory & audit

- 73% of the holdings were touched (over 30,000 boxes)
- 7 new fields created in the electronic system
- 2 new processes created for staff
- 2 new processes created for owners/senders
- 5 new box types discovered and created in the electronic system
- 4 new reports created for the electronic system

## Through the 1<sup>st</sup> phase of the move

- 100% of the remaining records will be touched
- The project plan grew exponentially
- We have a 100% understanding of our holding
- All data is auditable and reportable within the system
- As the inventory moves, corrections are still being made in order to strengthen the knowledge and integrity of our program
- New processes for box owners and senders to maintain integrity

# Questions?

