

Managing the Digital University Desktop



Understanding and Empowering the Individual; Preserving the Public Record and Institutional History

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Michael Meier, Program Officer
NHPRC
National Archives & Records Administration
700 Pennsylvania Avenue, NW
Washington, DC 20408-0001

Dear Mr. Meier:

This report presents our progress from January 1 - June 30, 2004 on the "Managing the Digital University Desktop" desktop project at the University of North Carolina at Chapel Hill and Duke University.

1. We spent much of the spring semester coding and making sense of the 100 interviews (74 questions each) we had conducted with people at UNC and Duke University regarding their management of email and other electronic files. Indeed, we had much more data than we anticipated and this aspect of the work took longer than originally planned. The NVIVO software used to code qualitative data is challenging, especially when there is more than one coder. This data will provide the basis for several scholarly and professional papers.
2. We have produced graphic representations of much of the data and this is stored on our website for project members' use at this time but will be made publicly available at the end of the project.
3. Tibbo presented MDUD progress at Triangle ARMA meeting in Raleigh, NC, January 8, 2004.
4. Tibbo presented "Managing the University Digital Desktop" at ECURE 2004 in Tempe, Arizona on March 2nd. See PowerPoint slides attached.
5. Pyatt presented a paper at MARAC on April 24, 2004 using MDUD data entitled: "Privacy and Confidentiality Issues in Private Institutions: Email as an Archival Record."
6. We are in the midst of producing an FAQ network that will serve as the basis of our instructional and guidance materials. After much reading of the literature regarding email

policy and behavior and after reviewing numerous state government email guideline websites and manuals, we decided that yet another lengthy “best practices” manual that we had proposed in our original plan would produce few if any effects. Our present goal is to create web-based materials that individuals can digest in small bites with clear examples. These will be based around actual questions that we collected from the campus-wide surveys and interviews as well as some “engineered” questions designed to make specific instructional points.

The FAQs are built around six areas: “Guidelines & Policies,” “Keeping and Deleting,” “Managing Email,” “Access & Security,” “Training,” and “Definitions.” Sample questions include: “Are email messages considered public records?” This question has subquestions of: “What is a public record?” What should I know about the public records law in North Carolina? And “What are records series and retention schedules and how do they relate to email?” We envision this network to be available on our website August 1, 2004 in time for SAA. The categories, as did the interview questions, reflect the archival concerns of appraisal, authenticity, arrangement, description, physical preservation, and privacy and security.

These FAQs are a work in progress and we plan on updating them throughout the project. When the project is finished in 2005 they (or versions, parts appropriate to each campus) will be mounted on the archives/records management websites at Duke and UNC. These will be living FAQs in that new questions will be posted with answers as they arise from users.

7. We held a focus group workshop on March 10, 2004 at Duke University. In April 2003, the project team applied for and received \$1,000 from the Robertson Scholarship Collaboration Fund, a program that encourages and supports joint UNC-CH and Duke cooperative projects, to support this meeting. MDUD Project staff gave a status report and present early drafts of e-mail management policies in the form of “Frequently Asked Questions” for discussion and feedback from the participants. Participants included Advisory Board members and IT professionals at Duke and UNC. See attached reports to the full Advisory Board and the Robertson Scholars program.

Focus group participants were strongly supportive of the idea of the FAQs and their comments shaped the nature of the questions and the insights we had about them.

8. Conway, Pyatt, Tibbo, and Winget will be presenting in an entire session at SAA 2004 in Boston on Thursday afternoon, August 5th. See attached SAA program description for details. I hope an NHPRC representative can attend.
9. Chang submitted paper to *Archival Outlook* describing the Managing the Digital Desktop project in May 2004.
10. Chang to present a poster at American Society for Information Science and Technology in Rhode Island in November 2004.

Objectives set out in proposal work plan for this period and progress made is given in the table that follows.

Original Objective	Progress
Creation of draft desktop management recommended practices and guidelines manuals based on the data analyses from survey and interviews and the N.C. Public Records Law.	We have altered this objective to the creation of a detailed FAQ network. See above.
Review of this manual by selected study participants.	The Robertson Duke-UNC focus group was the first to review this concept and they liked it very much. When we have the FAQ network posted to the website we will ask these individuals and others at both campuses for further comment.
Revisions and writing of final manuals to be used at the statewide conference, in training sessions, and posted on the web.	We hope to have the FAQ network in a stable form (it will be a living document, thus never in “final” form) by the early fall. We are developing ideas and models for the Web-based instructional materials (self-paced tutorials and materials that instructors can use in classes) and will spend from July – Dec. developing and testing these.
Posting of best practices manuals for the UNC-System and Duke University on their respective websites; advertising its existence on various records management, archival, and higher education listservs; and soliciting feedback from readers.	We will be posting the FAQ network on the project website and asking for comment from that location. When the project is completed and all revisions are done, we will migrate appropriate

	sections to the Duke and UNC archives/records management websites.
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Please let me know if there is any other material you would like to see in addition to this report. We are working at turning our data into publishable papers and useful guidance and instructional materials.

Sincerely,

Helen R. Tibbo