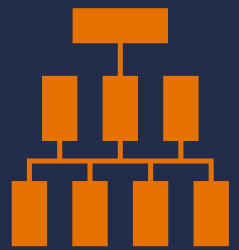


SHARED DRIVE CLEAN-UP CHECKLIST



START HERE

- Get leadership support
- Discuss at a staff meeting
- Create a committee
- Find representatives from work areas
- Involve IT personnel

THE 1ST MEETING

- Project the drive on a screen
- Divide the drive into work areas
- Devise a plan of attack
- Don't move or delete anything yet

THE PLAN

- Identify what you have
- Assign sections to team members
- Set deadlines by section
- Report the plan at a staff meeting

DELETE

- Delete if available elsewhere
- Delete if a duplicate or old version
- Submit RM3 form for records that have met retention
- Delete after RM3 is approved by RIM
- Empty trash

WHAT'S LEFT?

- Create an inventory
- Develop new folder structure (no more than 3 levels deep)
- Map new structure in inventory
- Identify duplication across sections

REORGANIZE

- Use inventory as map
- Move by section
- Create new folders/subfolders
- Use consistent naming
- Model after paper filing
- Communicate changes to staff



TIPS

- Manage electronic retention the same way as paper
- Use dates/years in folder names
- Don't create "Miscellaneous" folders
- Don't use employee names as folder titles
- Control access to sensitive data
- Teach new employees how to file
- Review the shared drive regularly

Need help? Ask RIM about Shared Drive Clean-up Service

