

# SHARED DRIVE CLEAN-UP



## 1. WHERE TO START?

- Leadership support
- Discuss at a staff meeting
- Create a committee
- Representation from each work area and IT

## 2. THE FIRST MEETING

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

## 3. THE PLAN

- Identify what you have
- Section assignments
- Set deadlines by section
- Report plan at staff meeting

## 4. DELETE!

- Met retention? RM3 Form?
- Available elsewhere?
- Duplicate or older version?
- Empty your trash

## 5. WHAT'S LEFT?

- Create an inventory
- Develop new folder structure
- Map new folder structure in inventory
- Identify duplication across sections

## 6. REORGANIZE

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

## TIPS

- Electronic retention same as paper; use years in folder names
- Don't create "Misc" folders
- Don't use employee names as folder titles
- Control access to sensitive data
- Review shared drive regularly

