Shared Drive Clean-Up

Create a Plan

- Identify and address pain points of your shared drive
- Consult the General Retention Schedule and supplemental file plan
- Modify or create a new directory structure
- Establish naming convention for files and folders
- Group files together by content (e.g. function, task, work unit, etc.)
- Label folders with corresponding retention periods and disposition
- Identify official records
- Use the retention schedule to identify records that need to be retained
- Delete records with expired retention periods if they are not under a record hold
- Identify and purge ROT (Redundant, Obsolete, Transitory records)

Establish Provisioning

- Who can access folders and files
- Who can add new folders and files
- Who can delete folders and files
- Who can modify folders and files

Consider a Reference Folder

- Information used for creating or updating other files
- Commonly used media
- Templates
- Electronic publications accessed for research
- Do NOT use the shared drive to file items that are available on the Internet

Purging ROT

- Non-Records and personal files
- Reference Files
- Duplications of information already on the shared drive
- Duplications of information found on Inter-, Intranet sites
- Copies of final documents and drafts
- Records with lapsed retention periods which are no longer required to be retained

Ensure Records Are:

- Retrievable
- In a usable format
- Accessible to those needing access
- Secured from inappropriate access
- Protected from inappropriate dissemination, modification or destruction
- Disposed of in accordance with the approved retention schedule