

Shared Drive Clean-Up

Create a plan

- Identify and address pain points of the shared drive
- Establish a timeline for completion
- Assign duties (e.g. *Vi is responsible for reviewing the shared budget folder*)
- Build time into your schedule to review the information on the shared drive

Establish rules

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

Consult the General Retention Schedule (GRS)

- Identify official records
- Use the retention schedule to identify records that need to be retained by your dept/office
- Delete records with expired retention periods if they are not under a records hold
- Identify and purge ROT (Redundant, Obsolete, Trivial records)
 - Non-Records and personal files
 - Duplications of information already on the shared drive
 - Copies and drafts of final documents
 - Records with lapsed retention periods which are no longer required to be retained

Modify or create a new directory structure

- Group files together by content (e.g. function, task, work unit, etc.)
- Establish naming convention for files and folders
- Label folders with corresponding retention periods and disposition

Consider a reference folder

- Information used for creating or updating other files
- Contact lists
- Commonly used media (e.g. photos)
- Templates
- Do not use the shared drive to save items that are available on the Internet

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

