Shared Drives (Example P: drives) are used across campus as a space for storing electronic information in a place where multiple people within a team or unit can access, edit, save, and store information. If not managed properly, drives can quickly become unmanageable with redundant, inaccurate, and un-reliable information.

## Why should we clean up our Shared Drive?

Efficient shared drive management allows your unit to:

- Retrieve the right information in a timely manner,
- Reduce storage costs,
- Reduce duplication of files and redundancy,
- Improve collaboration and sharing of information across your unit,
- Ensure that records are authentic and reliable,
- Remove transitory information in a timely manner,
- Identify records with long-term value,
- Distinguish drafts and other types of documents,
- Easily apply records retention and disposition.

## How do we clean up our shared drive?

### Step 1: Assign Responsibility

Each unit should designate a person or persons to be responsible for monitoring their shared drive, maintaining the structure, creating new folders, and overseeing the periodic clean-up of the electronic records stored in their shared drive.

**NOTE:** Each individual employee is responsible for managing and appropriately filing the information they create.

**NOTE:** Access to certain types of information (Ex. Files concerning individuals) should only be given on a "need to know" basis. Personnel who have been assigned responsibility must take this into account when creating the inventory of their shared folders. Contact the AIPO for more

### Step 2: Inventory folders and sub-folders

Inventory your current shared drive to determine:

- Current high-level folder structure to understand how the information was saved;
- Last accessed dates and last modified dates to understand when the information was accessed;
- Transitory information: identify duplicates, obsolete or information of short term value that could be deleted;

## HELPFUL TOOLS

*Naming convention*

*General Classification plan*

*Retention and Disposition Schedule*

*What can I delete best-practice*

*What do I keep best-practice*

- What should be kept for their strategic and operational value;
- If access restrictions are required; and
- Consult with your unit once you have created this inventory.

Information from shared drives should never be copied and saved on individual workstations or devices such as USB keys during clean up.

## Step 3: Map folders and Sub-folders to General Classification Plan

Your Shared Drive should be re- classified using the *General Classification Plan* (coming soon). The General Classification Plan is structured based on FUNCTION and ACTIVITY and is currently being optimized to meet the needs of the different units on campus.

Please contact the Information and Archives Management Service to finalizing the classification structure for your unit. They will provide support and work with you to determine your functions and activities.

Using the inventory created in Step 2, map your files to the *General Classification Plan*. In some cases, you will simply need to re-name some of your folders and sub-folders. In other cases, you will need to move files from existing folders into new folders.

Ensure that all personnel in your unit who use the shared drive are aware of this upcoming change, and are familiar with the new structure BEFORE moving files over. Get their input and set a date where this change will take effect before actually moving any files over.

## Step 4: Move or Rename Folders

Use the new folder structure created based off the General Classification Plan and rename and re-arrange the folders or move the files into appropriate folders.

Alert the personnel in your unit that no changes should be made in your shared drive during this time.

Ensure access restrictions are assigned appropriately.

## Step 5: Regular Maintenance

The assigned individual or individuals should regularly review the shared drive to make sure files are appropriately classified and that access restrictions are appropriately assigned.

## Step 6: Disposition

Before disposing of any information, other than transitory information, please contact the Information and Archives Management Service for guidance and support.

**Regular removal of transitory information will help keep your shared drive clean!**