

Table of Contents

- Introduction and Overview6**
 - The Need for Shared Drive Organization6
 - The Symptoms*.....7
 - The Benefits*8
 - Getting the Right Expertise9
- Phase 1: Conducting an Assessment..... 10**
 - Assessment Questions for IT Professionals 10
 - Company Background (if not known)*..... 10
 - Shared Drive Information*..... 10
 - Other Computer Systems* 12
 - Paperless Office Intentions*..... 12
 - Assessment Questions for Divisions and Areas 13
 - Shared Drive*..... 13
 - Other Computer Systems* 13
 - Paper Management*..... 14
 - Email Management* 14
- Phase 2: Getting Ready for Facilitated Sessions 15**
 - Equipment and Set up 15
 - IT Involvement 15
 - Employee Engagement and Identifying Participants 16
 - Participant Communications 17
 - General Electronic File and Data Management Guidelines 18
 - Shared Drive Pre-Clean Up..... 18
 - Paper File Systems 19
- Phase 3: The Facilitated Session—Introduction and Setting the Stage20**
 - Introduction Talking Points20
 - Introduction of Facilitator*.....20

<i>Issues and Benefits of Restructuring the Shared Drive</i>	21
<i>Parallel File Structures</i>	21
<i>Backup Process</i>	21
<i>Clarification of Drives</i>	21
<i>C Drives</i>	22
<i>Personal Drives (H Drives)</i>	22
<i>Shared Drive</i>	22
<i>Life Cycle of Electronic Data</i>	22
<i>Relocation of Data</i>	22
<i>Access to Electronic Documents</i>	23
<i>Linked Files</i>	23
<i>Next Action Items</i>	23
<i>General File Guidelines</i>	24
<i>Reviewing the Template</i>	24
<i>Email Management</i>	25
Windows Explorer Set-Up	25
<i>Opening Windows Explorer</i>	26
<i>Customize View in Windows Explorer</i>	26
<i>Increase the Font Size</i>	28
<i>Create an Action Holding Area</i>	29
Phase 4: Creating Guidelines and Restructuring the Shared Drive	31
About the Template	31
<i>Template Format</i>	31
<i>Client Info</i>	32
<i>General File Guidelines</i>	33
<i>File Structure</i>	33
<i>Next Action Steps</i>	33
<i>File Tips</i>	34
Completing the File Structure Worksheet	35
<i>Drive and File Hierarchies</i>	35

<i>Document Guidelines</i>	37
<i>Document Naming Convention</i>	37
<i>Determining Document Names</i>	38
<i>Abbreviation Use</i>	39
<i>Text Separators</i>	39
<i>Dates</i>	40
<i>Naming Length</i>	40
<i>Version Control</i>	41
<i>Document Retention</i>	42
<i>Government Retention</i>	42
<i>Paper Retention</i>	43
<i>Electronic Retention</i>	43
<i>Permissions</i>	44
Restructuring the Drive	45
<i>Creating File Folders</i>	45
<i>Moving Documents and Files</i>	46
<i>Deleting Documents and Files</i>	46
<i>Deleting Temporary Documents and Files</i>	47
<i>File Extensions</i>	48
<i>Document Protection</i>	49
<i>Mark as Final</i>	49
<i>Read-Only Access</i>	50
<i>Password Protection</i>	53
<i>Historical Files and Documents</i>	55
Phase 5: Employee Training	58
Optional Tools and Techniques	58
Document Management Systems	58
<i>The Benefits of DMS</i>	58
<i>Considerations in Choosing DMS</i>	59
Scanning Options and Plan	61

<i>Documents to Scan and Process</i>	61
<i>Recommending Scanning Equipment</i>	62
<i>Recommended Scan Format</i>	62
<i>Scanning Outsourcing</i>	63
Paperless Recommendations	63
Metadata	65
Software Tools	67
<i>Desktop Search Tools</i>	67
<i>File Managers</i>	68
<i>Files/Folder Utilities</i>	68
Conclusion	69
Appendices	70
Appendix A: Screen Shot and Computer Instructions	71
<i>Windows Explorer</i>	71
<i>Microsoft Excel</i>	71
<i>Microsoft Office</i>	71
Appendix B: Sample File Structure	72
Appendix C: General Records Retention Schedule	73
Appendix D: FAQs for Participants	76
Appendix E: Introduction Talking Points Checklist	78
Appendix F: Getting Ready for a Facilitated Session Checklist	79
Appendix G: Developing a Proposal (For Consultants)	80
<i>Overview</i>	80
<i>Process and Services</i>	80
<i>Duration and Time</i>	80
<i>Prices and Fee Structure</i>	80
<i>Billing Policies and Cancellations</i>	80
<i>Confidentiality Agreements</i>	80