

Best Practices for Managing Shared Drives

Revised June 2020

Organization

Organize folders by project, program or entity, not by staff name. Filing project, program or entity records under staff folders leads to file duplication, confusion over where a file should live, and loss of records when a staff member leaves.

Centralization

Putting multiple copies of the same folders, subfolders or documents all over a department drive creates confusion within the department, out of control versioning, and mismanagement of files.

Use one folder for centralized records (templates, finances, projects, et cetera) rather than copying records in multiple places. Use shortcuts to point to a document or folder, rather than copying. Pin commonly used files for ease of access.

Consistency

Work with your department to decide on a consistent folder structure and a consistent file naming convention that works best for your group. Make sure everyone is informed of the protocols and follows the agreed upon structure. Example: "Expense Report LastName YYYYMMDD"

Office of Record

An "Office of Record" refers to the department responsible for maintaining the official record type listed on the Archdiocesan Retention Schedule.

The Office of Communications is the office of record for communications files, such as memos and Communique announcements. Departmental copies of memos are kept for convenience and should be retained for approximately one year unless your department needs to keep for longer.

The Office of Finance is the office of record for financial files, such as expense reports, check requests, mileage, budgets, invoices, etc. Departmental copies of financial records are kept for convenience and are not the official record. The Office of Finance keeps these records for five years, but other departments need only maintain these for approximately three years.

Maintenance

Give one person in your department "ownership" of the shared drive, so they can monitor the drive for consistent filing and any unnecessary duplication. This person can be in charge of familiarizing new employees with the filing norms for your department.

Review your department folder on the shared departmental "M" drive at least once a year. Either fiscal year or calendar year or school year are good options, depending on your department's work flow.