

**UW-Madison Records Management Program**  
*Setting Up, Cleaning Up, and Maintaining the Organization of Department Shared Drives*

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UW-Madison Records Management Program  
UW-Madison Archives and Records Management

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**Shared Drive.....Where to begin?**

- What are Shared Network Drives?
- Where does a department or unit begin?
- Once completed how to maintain a shared network drive?



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**What is a Shared Drive?  
Network Drive**



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## Slide 1

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- m1** At the University of Wisconsin-Madison, many departments/units use shared network drives to store and manage information.  
PegEusch, 6/17/2016

### Why Cleanup or Reorganize Shared Drives?

- 1. Retrieve information efficiently**
  - eliminate clutter
  - structure content logically
  - appropriate tagging results in information findability
- 2. Reduce redundancies and versions**
  - Improved information sharing reduces duplication
  - Reduces the risk of using wrong version for business decisions
- 3. Apply retention and disposition schedules**
  - If applied consistently can slow growth curve
- 4. Reduce costs**
  - Server costs increase logarithmically with permanent preservation
- 5. Encourage information sharing**
  - Well organized shared drives simplify security and sharing of info across the department/unit



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### Setting Up and Cleaning Up Your Shared Drives:

The Cleanup Process



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### Setting Up and Cleaning Up Shared Drives: Where Should we Begin?

1. Make sure the right people are involved.
2. Clear out the easy ROT (Redundant, Obsolete, and Trivial Files) first. Other files that can be easily disposed of include temp files and redundant files. Examples of redundant files would include multiple copies of Mark's conference speech in Word and PDF, and various drafts of the speech. It is likely that only one copy of the final version is necessary to maintain.
3. It may be necessary to make a second pass looking for additional ROT missed on the first pass.



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**Setting Up and/or Cleaning Up Shared Drives:  
File Folder Structure**

**Taxonomy / Classification and Naming Conventions**

**Taxonomy (File folder structure)**  
 > Hierarchical  
 • Function Activity  
 • Topic  
 • Subtopic

E.g. Research Project XYZ  
 - Research Data-Raw and Analyzed  
 - Audio Video recording

- Utilize the Record Retention Schedules as a beginning guide for organizing and filing.
- Keep the naming policy and conventions simple and easy to understand for ease of use.

**XYZ Research Project**

- Research Data - Raw and Analyzed
  - Audio Video recordings
  - Instrument Readings
  - Lab Notebook
  - Photographs
  - Questionnaires
  - Samples
- Research Management Proc.
  - Applications for funding
  - Contracts
  - Invoices
  - Staff Timesheets
- Research Outcome or Products
  - Technical Reports
- Research Process
  - Research Protocol, Approvals

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**Naming the Folder Structure or Electronic File**

**Example:**  
 2016MeetingMinutes  
 20160701MtgMinRPT  
 20160801MtgMinRPT

*metadata information Data*

No matter which technology environment or folder structure is currently in place, the naming convention should include some or all of the following seven elements.

Name Element	Example	Description of Need to Use
Title	Lecture Review	
Version Number	V01	The first three elements (date, version and desc) are usually needed to facilitate searching for the document and the display of file documents in a logical order.
Date (publication date, creation date, or legal date preferred by the document)	2015_01_31	
Author or Creator	Shawlin	
Business Unit / Program	Research	The middle elements (author, business unit, dept) may be omitted, depending on the business requirements. They can be helpful in checking the consistency of the document.
Type (e.g. report, memo, letter)	RPT	
File Extension	.doc	The last element (file extension) is generated by the application in which the document has been created, and is always last. It is important to remember that this element should not be altered.

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**Keeping Your Shared Drives Organized:**  
 Increasing the Longevity of Established Systems





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