DALHOUSIE UNIVERSITY

M E M O R A N D U M

Date:

To:

From:

Re:

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As we are sure you will agree, the *[insert unit name]* *[use language used in unit: NAS / shared drive / O:Drive]* seems to have become a digital landfill and can be extremely frustrating to navigate and find documents on. With the help of the Dalhousie Records Management Office, we are endeavoring to clean up and restructure the shared drive. This process will involve a retention schedule for closed files, as well as a procedure for archiving or deleting files which are no longer active and/or required. This will be a multi-step process that will take several months to achieve. Your assistance may be required throughout the process and in various ways, and eventually, your adherence to the new procedure for managing all documents (saving and disposition) will be appreciated.

Eventually, an information session will be held with each unit to describe the project in more detail. It is our hope that, once completed, the restructuring of the drive will simplify the saving and locating of all documents.

Under the current arrangement where the majority of employees are working remotely, it may not be possible to carry as full of a workload as you would have on a typical day in the office, presenting an opportunity for you to help begin the restructuring process! To do this, please review the folders you currently have access to on *[use language used in unit: NAS / shared drive / O:Drive]*. You are encouraged to:

Delete Redundant Subfolders/Files – Empty folders, duplicate files, working copies (aka old versions) should all be deleted. If you see file folders for employees no longer with *[insert unit name]* review the contents of the folder and relocate these items as appropriate. Then delete the empty folder.

Identify Items to be Archived – If there are items that are no longer active and/or have not been accessed in the past year, create a folder within your individual section called "FOR DISPOSITION" and relocate them there. These files will be reviewed in due course to determine how long they must be retained and whether they will be archived or deleted. There is a procedure to follow for both of these actions which will be addressed at a later date. Please

be assured that archived files will be very easy to access at a later date, if required. This will be covered in the information session.

Remove Personal Files – Personal information is not to be kept on the Dalhousie server or the hard drive of any Dalhousie computer. This includes pictures and music. Please place all personal files (if any) onto a personal USB stick.

Rename Files – Ensure folders and files are named so that the contents are easily identified and include the date it was finalized at the end of the name (e.g. Staff Meeting Minutes - 2020-03-18 – FINAL). Do not start file names with the words "memo, letter, draft, report, final". Instead, use the name of the addressee/committee/meeting, etc and a brief description of the purpose of the document (e.g. John Doe – Vacation Accumulation – 2020-03-18). Keep naming conventions consistent. Consider adding the word "FINAL" at the end of filenames for official documents such as reports and minutes.

Group Files Accordingly – Review subfolders and move common files into one folder and delete remaining empty folders.

Photos /Videos – All photos/videos should be reviewed to determine whether they need to be saved. If so, please ensure they are saved in the relevant subfolder (e.g. specific project folder, building folder, etc) or create an appropriate subfolder for them with a clear name identifying what they are (e.g. John Doe Retirement Photos– DATE; *[name of unit]* Appreciation Luncheon Photos – DATE, etc).

When reviewing photos related to informal internal *[insert unit name]* social events (e.g. potluck lunches, etc), please create a folder appropriately named with event name and date. We will eventually organize these in an *[insert unit name]* Social Event subfolder.

NOTE: Where possible, photos that contain "subject Individuals" (aka speakers, special guests, hosts, staff members, etc) should have their names included in the file description. (This does not include people in the background of the photo). To do this, right click on the photo, click "Details", then enter the names under "Comments".

Please note that this initial cleanup does not relate to project files, other than ensuring all related documents are stored in one folder. Files stored in *[insert systems used if applicable]* etc, will not be relocated at this time. However, if you have closed files related to projects which should be moved to *[insert systems used if applicable]* for safekeeping, please do so.

We appreciate that this is a daunting task. Perhaps the solitude of working at home may assist in completing this tedious undertaking – one file, one folder at a time. Your assistance in cleaning up our *[use language used in unit: NAS / shared drive / O:Drive]* is much appreciated. If you have any questions with this first step please reach out for clarification. We will be in touch in due course to set up an information session on this project.

Thanks!