

## Shared Network Drives

### Introduction

In most organisations' computer networks, there are a series of Drives used for the storage of information. These are often divided up into the following categories:

- A corporate-wide shared drive, containing documents relevant to the whole organisation;
- A branch, or group shared drive, containing documents relevant to a single organisational unit;
- A personal drive (for example, a P: or U: drive), containing documents relevant only to individuals.

It is necessary to identify clear and acceptable use policies for all three categories of drive. Good practices in managing electronic documents should be initiated in both the user workspace and the corporate space and, like so much in this area of work, begins and ends with the individual.

### Detailed description of the process

**Implement 'publish and point' across the organisation:** This is a method of controlling the duplication of a document being circulated. Instead of attaching the document to an email message, which gives each recipient an individual copy, a read-only version of the document is placed on a shared drive – 'published' – and a 'pointer' or shortcut is emailed to alert intended recipients. Recipients can then retrieve the document from the shared drive as required. This will help to encourage a culture of sharing documents and lead to users thinking more carefully about the most appropriate method for publishing information to recipients and to treat these consistently as formal corporate documents. It will also reduce the amount of multiple working copies in the folders of many individuals.

**Establish a general filing structure:** Where there is a significant number of electronic documents stored on a shared network drive, a basic general filing structure should be established. Where there are group or project-based filing structures, these should aim to conform to the principles of the general filing structure to prevent divergent practices and application. The general filing structure on network drives should:

- Use simple but logical structures which meet the needs of both the organisation and the users;
- Not use individual names or position titles for directory or folder names;
- Use names which identify logical elements, such as business functions and activities or theme: sub-theme relationships.

The need for good filing structures in a shared network drive is primary, but end users should also be encouraged to use consistent filing structures in their own group and personal workspaces. This will help with the coordination between working papers and formal finalised documents, and will ease retrieval and access across all workspaces for the individual.

**Use of a common terminology is essential to integration:** Planning the use of shared drives should be done in conjunction with thinking about naming conventions.

- Work towards consistent use of common terminology across all groups and units of the whole organisation;
- Develop formal liaison mechanisms between those responsible for records at the local level to establish and enforce these conventions;
- Where feasible, make terminology in the shared network folder structure consistent with terminology in the paper filing system.

**Build links to the paper filing system:** The organisation of a shared network drive can usually be made to reflect the paper filing structure so that electronic documents are stored in a manner compatible with their paper counterparts. This may be achievable by building a hierarchical 'folder within folder' structure using Windows, to simulate the structure of a paper file plan. Some considerations are:

- Electronic structures tend to be broader and flatter – have less depth – than their paper counterparts; it is important to control the number of levels to retain usability: in general, no more than about four or five levels to a hierarchy;
- Alphabetical folder titles are generally more usable in the electronic environment than are numerical file or classification reference numbers;
- Paper filing systems tend to use longer names than are comfortable in a Windows environment, resulting in poor file directory displays.

**Control over folder creation:** Where the folder structure on shared drives is formalised, there is a need for clearly articulated rights and responsibilities for folder creation, potentially allocated to specific roles.

- The extent to which individuals workgroups are able to create electronic folders themselves;
- Mechanisms for guiding and controlling the use of terminology.

**Balancing drive usage:** Extending disciplined management to shared network drives will eventually involve decisions on appropriate technological support platforms and network bandwidth, and coherent policies and procedures will need to be developed. Consideration should be given to:

- The risk of lost documents in a shared network environment, where more reliability is expected;
- The need to provide back-up storage;
- The implications of shared storage for network traffic and bandwidth requirements;
- Clear identification of material that should be entrusted to a shared drive and material that should be entrusted to the non-shared environment.

**Disposing of documents:** In all cases, 'good housekeeping' of both shared and personal drives is essential to maintaining long-term viability, removing material which should no longer be kept, whether classed as document or record. Guidance is needed for removing:

- Unnecessary duplicates of final documents;
- Working copies which are no longer required;
- Documents which have no continuing value.

Users of local drives and personal areas of a network drive should also be encouraged to perform basic housekeeping. Regular use of the Windows Explorer 'find' facility for documents created and modified in a given period of time, will help ensure that locally held

files are deleted or copied to the relevant shared drive as appropriate. Local drives should not be used for long-term storage of corporate level documents.

**Example: Tearfund shared drives**

During 2001, Tearfund established a shared drive on its server with the explicit purpose of supporting learning. The shared drive is organised with a folder for each of Tearfund's 15 departments, in which there are five sub-folders: 'About', 'Policy', 'Strategy', 'Learning' and 'Archive'. All activities, projects and correspondence are organised within the sub-folders and each department has an assigned activity administrator responsible for ensuring the folders are correctly and consistently used across departments. The 'Learning' sub-folder allows the results of all learning (from 'peer assists', 'learning afters' or 'learning reviews') to be located and retrieved at head office. The introduction of an intranet was planned in order to make the shared drive structure more widely accessible.