

Filestore Management for staff

The size of the University's electronic storage areas is increasing at a greater rate than ever before. In order to keep systems running efficiently, we all need to take responsibility for ensuring that we only store relevant information in the correct place. This is part of a larger University initiative to help you make the best use of University systems and your own electronic storage quotas.

Below are 6 simple steps we urge you to undertake in your filestores to manage the size of your own electronic storage areas.

1. Find out how big your folders are

As a responsible user, you need to be aware of how large your files and folders are. Identifying which folders are very large might help you prioritise areas to tidy up first.

To find out how big a folder is from Windows Explorer or My Computer:

- Right click on the folder.
- Choose **Properties**.

This displays the folder size for that folder. Compare the folder sizes and identify the largest ones. You may wish to investigate folders which are bigger than you expected.

2. Sort your files

By automatically sorting files in a folder you can quickly find groups of files that you can delete.

For example, drafts, backups or old files. This is how to do it:

- Arrange files by size or by type. Identify the largest files and decide whether they need to be stored.
- Identify and delete documents from a particular person or group which are no longer relevant.

To sort messages, simply click on the grey header at the top of the column you want to sort by.

3. Delete multiple files at the same time

You can select multiple files at the same time then either delete, or move them all as a group:

1. Click on the first file.
2. Press and hold the **Control Key** on the keyboard.
3. Click on further files that you would like to select.

Select a group of items that are next to each other: Click on the first one, hold down the **Shift Key** and click on the last one. This highlights all items in between as well.

Once you have highlighted all of the items, press the **Delete Key** to delete them, or drag and drop the items onto a folder to move them.

4. Duplicate information

Please think about the information you are storing. If the information is already stored elsewhere, you may not need to store it again.

For example:

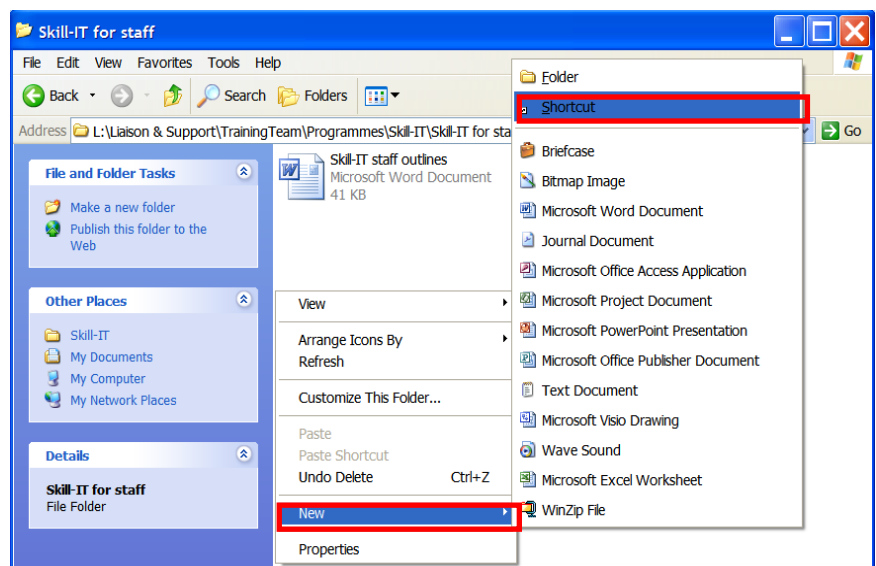
- Data from databases: is data you have exported to Excel or Word still relevant or can you delete the file?
- Information from the Web: if information is available on the internet/intranet, you do not need to store your own personal copy.
- Information already on shared filestores.

5. Creating shortcuts to documents

It is occasionally sensible to have access to a file or folder available from two separate locations. For example, a file belonging to a project might need to be situated in the project folder but also in the team folder. In this case you can create a shortcut to the file or folder, which will be stored once, but available from both locations.

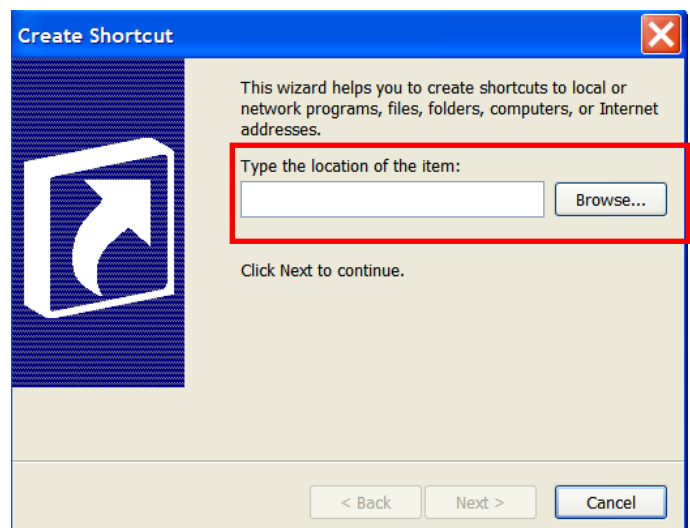
To create a shortcut to a file or folder:

1. Navigate to the location where you would like the shortcut to sit.
2. Right click and choose **New**.
3. Choose **Shortcut**.



This opens the **Shortcut Wizard**.

4. Click on **Browse**.
5. Navigate to the file or folder that you are creating the shortcut to.
6. Click on **Next**.
7. Click on **Finish**.
8. The file or folder should now appear in the new location. A little black arrow indicates that this is a shortcut.



6. Naming convention and version control

There are a few common barriers to efficient management of electronic information. These include:

- Inconsistent naming of files making information hard to find.
- No version control on documents.
- Lack of confidence in shared electronic information.

Naming conventions

A naming convention helps everybody to:

- Easily identify the file they need.
- Differentiate between different files.
- Navigate to the right file more easily.

File names tend to be made up of some of the following fields:

- Names of people, places, departments etc
- Some description of content
- Type of document
- Date
- Version number

At the very minimum file names should include the following: Description, Date, Type and Version. Filenames do not need to contain information contained in a folder name. E.g. if the folder is for a specific meeting and the folder name includes the date, the filenames do not need to include the date as well.

Principles

- File names should be concise – short yet meaningful with the most important words at the beginning of the filename and less important words (e.g. type of document) towards the end. . E.g. File containing the minutes of the Maxwell Building Project Team for Monday 7th of April.doc should be renamed Maxwell Building Project minutes 7 April.doc
- Dates should be in the format YYYYMMDD or YYMMDD. Doing this will sort documents by date order.
- Symbols and spaces should not be used in filenames. Symbols are used in a number of different ways by computers and so it is best to avoid them in filenames as using them may cause unexpected problems. Spaces prevent hyperlinks to files from working properly. Underscores in a filename are difficult to see when used in hyperlinks and so should also be avoided. Capital letters can differentiate between individual words.

E.g. 20080409MaxwellBuildingProjectMinutes.doc

Version Control

All electronic documents should be given a version number following the guidelines below.

Naming

Version numbers are prefaced with a lowercase v.

Drafts

First drafts are given the version number v0.01

Subsequent drafts are numbered v0.02 to v0.99

Issued versions

The first issued (i.e. final or published) version is given the number v1.0

Subsequent issued versions with minor changes are numbered v1.01 to v1.09

Substantially amended versions are numbered v2.0 to v99.0

Issued versions undergoing amendment

Issued versions undergoing amendment are given the number v1.0a to v1.0b, or v1.01a to v1.01z