Using Shared Drives to Manage Information

University information in electronic format needs to be managed in a way that ensures it is accessible, available and preserved for as long as it is required. In the absence of an Electronic Document Records Management System (EDRMS), University staff members need to ensure that steps are taken to create, capture, manage and dispose of electronic records in an authorised manner.

What is a shared network drive?

A shared or network drive is an IT supported, authorised and managed shared server which provides electronic storage space for authorised users in work areas. It can also be referred to as a J:Drive. A shared network drive is not a substitute for a controlled recordkeeping system but should be used as an interim measure until the University has acquired and implemented an EDRMS.

Why should I use my area's shared network drive?

As Curtin staff members, one of your information management responsibilities is to always store your area's electronic documents within Curtin's official Information Management System - your shared drive, placed within the appropriate folders according to its subject.

Do NOT store official Curtin documents on your desktop, personal drive or personal email folders or removable media such as thumbdrives or external hard drives.

For more information on your information management responsibilities as Curtin staff see: Managing Information at Curtin.

Benefits of a shared network drive

- Staff members within work areas know where to access information
- It provides a central space for storing University information in electronic format for the work area
- Backed up and supported by Curtin IT Services
- Reduces duplication by having one central storage space for your work area
- University information is not lost when staff members leave the work area
- Electronic information relating to the one subject is kept together
- Supports management of versions, drafts and working documents
- A controlled hierarchy of electronic folders and document titles makes it easier to retrieve information

Using a shared drive

As shared drives are not an EDRMS there are issues that staff should be aware of:
- To avoid your area's shared drive becoming disorganised and poorly controlled you may wish to use the Curtin Common Vocabulary* for the top levels of your folder structure
- Limit the number of people responsible for creating folders
- Roster a review of items within the shared folders into your work schedules to avoid duplication
- Be aware that information stored on an electronic folder should only be removed or destroyed in a manner described in the University's Recordkeeping Policy
- Use Records & Information Management's advice provided for Document Naming Guidelines to ensure consistent practices within the work area.

*Please note the Curtin Common Vocabulary is currently under review.

Making Information Matter!

Access and security

While Shared Drives are an excellent way to share information staff should also be aware that some of their documents may require greater security provisions to protect them:

- Identify electronic records that require access restrictions
- Contact the CITS Service Desk to ensure that access and security is managed by limiting access to view particular folders to authorised staff members
- Keep it simple - avoid creating a complicated system as it will be hard to manage
- To protect your documents from accidental alteration you can make them "read only" or activate version control where software permits.

Retrieval and navigation

- Navigate down through folder structure
- Conduct a search on the shared drive
- Create short cuts to access frequently used folders
- For further advice on saving and retrieving information please refer to Saving and Retrieving Electronic Documents (PC) or Saving and Retrieving Electronic Documents (Mac).

What about email?

Move business email messages to your area's shared mailbox. To set up a shared mailbox contact CITS Service Desk.

- File emails only after they have been sent
- Save both message and attachment together
- Save final message in thread
- Save within same subject folder

In the absence of a shared mailbox all business email messages should be saved into the appropriate folder on your shared drive. Make sure they are saved as Outlook Message format (*.msg) to retain any attachments. Emails can be dragged and dropped from Outlook into the relevant shared driver folder.

Can I delete information on my shared drive?

- **The short answer is No. University records should not be deleted from the shared drive.**
- Legislation that applies to hard copy information also applies to electronic information
- Electronic records must only be destroyed in accordance with approved Disposal Authorities. See Sentencing Information.
- Ephemeral information with no ongoing administrative, legal, evidential or historical value to the University can be destroyed once reference ceases. See Keeping the Right Information.
- All University business information in electronic form must be preserved for as long as it is required for legislative and business reasons.

Need assistance?

Please see the following related advice sheets:
- Managing Information at Curtin
- Managing Your Email
- Sentencing Information

For more information please visit the Records & Information Management website at *rim.curtin.edu.au.*

If you need assistance, please contact us by email at *rim@curtin.edu.au.*