Correct Use of Shared Drives

High value 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. Charles Sturt University uses a records management software system known as HPE Records Manager to support its corporate recordkeeping needs. HPE Records Manager provides a common, shared source of information which is accessible, within security restrictions, to everyone who needs it, for as long as it is needed.

What are shared drives?

Shared drives, also known as network drives, are used by CSU to store electronic information including Word documents, Excel spreadsheets, PowerPoint slides, digital photos, PDF documents and database reports. A shared network drive is not a substitute for a controlled recordkeeping system but can be used as an interim measure until the Faculty/Division has implemented HPE Records Manager.

Use of C: D: P: and S: drives

- S: drive is for the storage of University documents that are of interest to many people, they may be documents in draft mode, sharing mode or they may not have a need to be captured into HPE Records Manager but need to be shared.
- P: drive is for the storage of administrative documents that an individual requires to complete their job but the documents are not necessarily to be shared i.e. spreadsheet on staff flexi time, P: drive records have a short term value and are not captured into HPE Records Manager.
- D: & C: drives should not be used for the storage of University records as they are only accessible by the user.

As a CSU staff member your recordkeeping responsibilities require you to capture official CSU documents into the University's recordkeeping system HPE Records Manager.

Using a shared drive

As shared drives are not capable of acting as a records management system there are issues that staff should be aware of while using them:

- To avoid your areas shared drive becoming disorganised and poorly controlled, use of the Classification Scheme should be applied for naming of folders. This will support a smoother transition to HPE Records Manager (contact the Manager, University Records for further information)
- Naming conventions for HPE Records Manager should be used to name documents within the shared drive folders (the Manager, University Records can provide further assistance)
- 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 in an electronic folder should only be removed or destroyed in a manner described in the University's Records Management Policy

Staff at CSU are responsible for ensuring that all appropriate information is created and captured into approved systems. This helps CSU run efficiently and fulfills its legal obligations to the public and the State. However, not all information we create or receive needs to be kept as a University record. The following advice will help you identify what needs to be captured.

What type of information is it?

Information at CSU can be broken down into two categories:

- **Corporate information** — this is the significant information that we could not function without. It is the information that is required to support and provide evidence of business operations, decisions and authorisations and also support future planning.
- **Personal & Reference Information** — this information is also known as short term or ephemeral records, it contains little or no value to the University, today or in the future. Most of the time this information is duplicates or copies of original records.

The following lists provide a guideline of what information belongs in these categories. However, the lists are by no means exhaustive. If you need help identifying what information requires capturing, please contact the Manager, University Records at records@csu.edu.au

Corporate information

- Contracts/agreements
- Committee minutes and agendas
- Policy and procedures
- Official reports
- University publications
- Research data
- Significant drafts
- Some external publications
- Documented decisions/authorisations
- Financial, legal & historical records
- Original student records
- Original staff records

Personal and reference information

- Duplicate copies of original or other records
- Advertising material
- Lunch appointments
- Trivial exchanges e.g. thank you's
- Diaries
- Reference material
- External publications
- Routine or rough drafts
- Copies of staff records

- Copies of student records
- Copies of invoices/payments
- Copies of agreements/contracts

Further assistance

Please see the following related guides:

- Classification Scheme
- Naming Conventions for HPE RM
- Disposing of Records