

## Micro-Level: Practical Tools & Habits

Think of this as building your “muscle memory” for good file management. The goal isn’t a one-time cleanup but developing everyday habits that make staying organized automatic. These simple practices—like tidying as you go, using templates, and setting aside regular cleanup time—help keep the clutter from piling up and make sure everyone can find what they need when they need it.

- ❖ “Clean as you go” policy
  - Encourage employees to purge old drafts and duplicates when touching a file.
  - Make it a norm: if you open it, you leave it tidier.
- ❖ File Naming Conventions
  - Use a consistent standard (e.g., ProjectName\_Date\_Version).
  - Avoid mystery abbreviations that only one person understands.
- ❖ Shared Folder Etiquette
  - Save team files in shared drives, not personal ones.
  - Prevents loss of knowledge and ensures access when staff transition.
- ❖ Templates & Checklists
  - Utilize filing name templates and folder set-up checklists for new projects to ensure consistency. E.g., Every event folder has subfolders for Budget, Marketing, Logistics, Post-Event Reports.
- ❖ Quarterly “Digital Dumpster Days”
  - Pick one day each quarter when employees clean out their drives, guided by the [CSU Policy on Records, Retention, and Disposition Schedules](https://www.csuci.edu/policies/records-retention-disposition).
  - Celebrate progress, not perfection.