

Shared Drive Same Day Toolkit

A 90-minute working session for one program

Leave with a visible change

Aim to leave with a usable program folder, consistently named files, a short rules card, and an owner for anything unresolved. Finish by asking someone else to find the correct file. This is a small working session, not a whole-drive cleanup.

Bring two people and ten files

Bring the program owner and one colleague. Use ten low-risk working documents you are authorized to organize, or the ten fictional files in Practice/00 Intake. Use the sample route if ownership or access is unclear. You need no AI subscription or account connection.

Your 90-minute route

0-10: choose files and test finding them.

10-25: create the program folder and agree the rules.

25-55: name and file routine items.

55-70: assign uncertain items.

70-85: repeat the finding test.

85-90: record results and hand off.

Open these first

Use Same Day Tracker.xlsx to record the work. Use Filing Rules.docx for the team rules. This guide includes the folder map and safety checks. Practice Answer Key.txt shows the expected sample results. Optional AI Helper.txt is only for proposal assistance.

Set up one useful folder

Minutes 0-25 / Prepare and agree

Record the starting point

In the tracker, name the program, owner and reviewer. Log the ten source references. Ask your colleague to find two specific documents without help. Record the correct file, time in seconds and help needed. Use comparable tasks after filing; repeated searches can benefit from memory.

Create the working structure

Inside the approved program location:

00 Intake

01 Working / Reports

01 Working / Session Plans

01 Working / Resources

02 Approved

Leave Approved empty unless the records owner identifies an approved copy. These names do not create access controls. Folder Map.txt repeats this structure.

Agree one filename pattern

Program_Type_Date-or-Period_Status_Version.ext. Example:

Community-Learning_Report_2026-09_Draft_v01.txt. Use dates and versions from the document or owner. Never invent them. If a required field is missing, ask the reviewer. Keep the original file extension.

Check before changing a real file

Confirm owner, status, privacy and current approved copy. Use only files you are authorized to organize. Record the original location and destination. Keep access no wider than before. Leave official records, ambiguous versions and sensitive files untouched. If a copy is needed for practice, clearly label it as a practice copy.

Name file and resolve

Minutes 25-70 / Do the work

File the routine items

Read each selected file. Name it using the agreed pattern, place it in the permitted working folder, open it again and confirm the content and destination. In the tracker, enter the new path and mark Filed only after checking. Do not overwrite a file with the same name.

Use the fictional exercise

The practice rule is approved for fictional use only. Reports, Session-Plan and Resource files with all stated fields go to their matching folders under 01 Working. Seven samples have enough information. Leave originals in 00 Intake and copy the seven routine samples for rehearsal.

Keep uncertainty with a person

Samples 08 and 09 need review. Sample 10 is excluded. Retain uncertain or excluded real records at their existing restricted location, not a broadly shared review folder. Log a minimal reference, reviewer and one question. A name containing final or a signature does not establish approval.

AI is optional

If your organization permits it, paste only the fictional rules and a sample into the AI helper prompt. Review the proposal yourself. Do not connect a whole drive. Real data requires approval of the exact service, training/retention settings and access. You can finish this exercise entirely by hand.

Show the change today

Minutes 70-90 / Find and hand off

Repeat the two finding tasks

Ask your colleague to find the correct September report and the 12 October session plan, or two comparable real files. Check that the version and status are correct. Record seconds and help needed. A faster time is a small observed test result, not proof of long-term savings.

Record what actually changed

The tracker counts Filed, Review and Excluded separately. Seven sample filings, two review items and one exclusion account for all ten. For real files, record your actual numbers. A screenshot of the folder plus verified paths and retrieval observations makes the change visible.

Finish the handoff

Name the person who files the next document, the reviewer and backup. Save the approved rules where the team can find them. Pick a date to check new files next week. If the second person still needs help, revise names or folders before expanding.

Continue with a small next step

Repeat with another ten authorized files after this set works. Pause if access widens, approved records are replaced or source ownership is unclear. This pack installs no automation. Need help putting a repeatable workflow in place? Start with a free assessment. Nimara | v2.0 | 3 October 2026.