



## File Management – Saving Your Documents

You will save everything to your H: drive. This is your personal drive that is out on the server and only you have access to it. It is not accessible by others. Your H: drive is accessible from any CCPS computer or from home via Remote Access.

### Accessing Your H: Drive

To access your H: drive via the desktop:

1. Double-click the “This PC” icon.
2. Under Network Locations, double-click the drive that begins with your username and ends with the letter “H”.



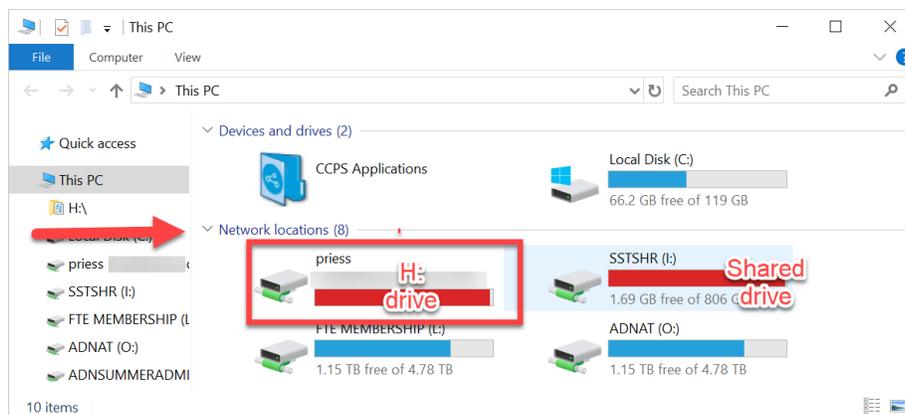
To access your H: drive via File Explorer:

1. Click the yellow folder at the bottom left corner of the screen.
2. Under Network Locations, double-click the drive that begins with your username and ends with the letter “H”.



### Accessing Shared Drives

If shared drives have been added to your profile, they will be located under Network Locations. If you need access to a departmental or school shared drive, please submit a work order so it can be added to your profile or email [helpdesk@collierschools.com](mailto:helpdesk@collierschools.com).

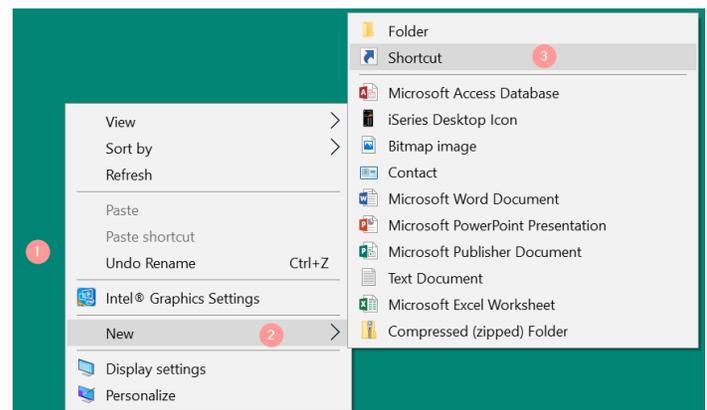


### Creating Shortcuts on the Desktop

Do not save documents/items directly to the desktop. If you would like to place documents on the desktop for quick-access, save your master documents to your H: drive and place a shortcut to the document on the desktop.

To create a shortcut on the desktop to a program or file do the following:

1. Right-click an open area on the desktop, Select **New**, and then click **Shortcut**.
2. Click **Browse**.
3. Locate the program or file to which you want to create a shortcut, click the program or file, click **Open**, and then click **Next**.
4. Type a name for the shortcut. If a **Finish** button appears at the bottom of the dialog box, click it. If a **Next** button appears at the bottom of the dialog box, click it, click the icon you want to use for the shortcut, and then click **Finish**.





## File Management – 10 Tips to Staying Organized

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Thought file management was just for paper files? Think again. It's just as important to keep the files on your computer organized and up-to-date. Just as with paper files, the goal of computer file management is to ensure that you can find what you're looking for, even if you're looking for it years after its creation. These file management tips will help you keep your files accessible:

**1. Organize by file types.**

Make applications easier to find by creating a folder called Program Files on your drive and keeping all your applications there. For instance, the executables for Word, PowerPoint, Simply Accounting and WinZip would all reside in the Program Files folder.

**2. One place for all.**

Place all documents in the H: drive folder and nowhere else. So whether it's a spreadsheet, a letter or a PowerPoint presentation, it goes here. This will make it easier to find things and to run backups.

**3. Create folders in H: drive.**

These are the drawers of your computer's filing cabinet, so to speak. Use plain language to name your folders; you don't want to be looking at this list of folders in the future and wondering what "TFK" or whatever other interesting abbreviation you invented means.

**4. Nest folders within folders.**

Create other folders within these main folders as need arises. For instance, a folder called "Invoices" might contain folders called "2020", "2021" and "2022". A folder named for a client might include the folders "customerdata" and "correspondence". The goal is to have every file in a folder rather than having a bunch of orphan files listed.

**5. Follow the file naming conventions.**

Do not use spaces in file names, keep file names under 27 characters, and use all lower case. So a file named for a client should be jackdawson rather than Jack Dawson. If you break any of these rules, be consistent about it.

**6. Be specific.**

Give files logical, specific names and include dates in file names if possible. The goal when naming files is to be able to tell what the file is about without having to open it and look. So if the document is a letter to a customer reminding him that payment is overdue, call it something like "overdue081206" rather than something like "letter". How will you know who the letter is to without opening it? See the next point.

**7. File as you go.**

The best time to file a document is when you first create it. So get in the habit of using the "Save As" dialogue box to file your document as well as name it, putting it in the right place in the first place.

**8. Order your files for your convenience.**

If there are folders or files that you use a lot, force them to the top of the file list by renaming them with a ! or an AA at the beginning of the file name.

**9. Cull your files regularly.**

Sometimes what's old is obvious as in the example of the folder named "Invoices" above. If it's not, keep your folders uncluttered by clearing out the old files. Do NOT delete business related files unless you are absolutely certain that you will never need the file again. Instead, in your main collection of folders on your H: drive, create a folder called "Old" or "Inactive" and move old files into it when you come across them.

**10. Back up your files regularly.**

Whether you're copying your files onto another drive or onto tape, it's important to set up and follow a regular back up regimen. See [The 3 Steps to a Successful Backup System](#) for more information.

The search function is a wonderful thing but it will never match the ease of being able to go directly to a folder or file. If you follow these file management tips consistently, even if you don't know where something is, you know where it should be – a huge advantage when it comes to finding what you're looking for.