



25-STEP CHECKLIST

FOR BETTER DOCUMENT ORGANIZATION IN THE CLOUD

Organizing documents in the cloud can be just as chaotic as storing them in paper form. If you want better organization despite quicker searches, follow this 25-step checklist for better organization on the cloud.

Folders

- ☐ Start with root folders for each business segment
- ☐ Create default folders for each program/process
- ☐ Name folders in a clear and concise way
- ☐ Use default folders whenever possible
- ☐ Choose a logical folder hierarchy and stick to it
- ☐ Nest folders within folders as it makes sense
- ☐ Utilize folder templates for consistent storage

Files

- ☐ Select & follow standard file naming conventions
- ☐ Include specific dates or file types in file names
- ☐ Archive unused files regularly to avoid clutter
- ☐ Use categories often to improve file structure
- ☐ Group files by easily identifiable characteristics
- ☐ Set-up shortcuts instead of duplicating files
- ☐ Don't float files (i.e. use * or _ before a file name)

Management

- ☐ Select a file order that works for you (i.e. by date)
- ☐ Use draft folders to track working documents
- ☐ File as you go, not retroactively
- ☐ Use subfolders for easy drill-downs
- ☐ Schedule regular file backups
- ☐ Move files as your business grows

General

- ☐ Assign tags and keywords for quicker searches
- ☐ Mark files and folders as favorites for easy access
- ☐ Share documents for better transparency
- ☐ Keep business and personal files separate
- ☐ Whatever you choose, be consistent

About Qdrive

The Qdrive Assistant is an intuitive cloud-based workspace that combines workflow management file sharing and in a secure, seamless platform. Use the power of collaboration and customization to reduce document storage costs and streamline administrative tasks. Get it free at www.qdrivesolutions.com/free-trial.