



# **10 Simple Steps to a more Organised Drive**

## **STEP 1:**

# **Clear the Clutter**

If your Drive is a mess, create a single folder called 'Archive' and move everything into it. This clears your workspace while keeping files accessible.

### **Example**

- Right-click anywhere in your Drive, and select New Folder
- Name it 'Archive'
- Drag all unorganised files into it.



You've got a clean slate to start again with. Now's the time to think about how you want your Drive to look and work for YOU.

## STEP 2: Build a Foundation

Organise your Drive by creating broad category folders like Personal, Finance, Business, and Hobbies.

### Example

- Right-click and select New Folder
- Name it 'Personal'
- Repeat steps to create folders for 'Finance', 'Business', and 'Hobbies'



Think about your core areas of work and personal life when deciding on categories.

## STEP 3: Tackle the Archive

Go through the files in your Archive folder and move them into their appropriate category folders. When it's empty, delete the Archive folder.

### Example

- Open the 'Archive' folder
- Right-click a file
- Select Organise > Move to > [Category Folder]
- Use batch select (Ctrl+click or Shift+click) to speed up the process
- Once done, right-click the empty 'Archive' folder and select Move to bin/trash.

## **STEP 4:**

# **Create a Logical Structure**

Break down category folders into sub folders to better organise specific files.

### **Example**

- Open your 'Business' folder
- Right-click, and select New Folder
- Create sub folders like 'Clients', 'Email Marketing', or 'Website'
- Repeat for each main category folder based on its needs.

## **STEP 5:**

### **Sort in Detail**

Place files from category folders into their relevant sub folders to keep everything easy to find.

#### **Example**

- Open the 'Clients' folder inside 'Business'
- Drag a client's project file into their dedicated sub folder, or use Organise > Move from the file's right-click menu.

## STEP 6: Visual Organisation

Assign colours to your main folders to quickly identify categories and add personality.

### Example

- Right-click a folder, select Organise > and choose a folder colour.
- You can even add an emoji to the folder name if you like :)



Go one step further and use the same colours across your Google apps e.g. if you apply blue to your Client folders, then apply blue to your Client labels in Gmail and your Client work in your Google Calendar.

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## **STEP 7:**

# **Simplify and Save Space**

Dedicate time to delete duplicate or unnecessary files and schedule recurring reviews to maintain order.

### **Example**

- Use the search chips at the top of the page to locate old files
- Click 'Modified' chip > Custom date range and add in Before date to bring up files last edited before a certain date
- Select and delete them by right-clicking and choosing Move to bin/trash
- Set a monthly reminder on your calendar to repeat this process

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## STEP 8: Manage Permissions

Check shared files periodically to ensure permissions are up-to-date and secure.

### Example

- Click on Shared with Me in the left hand menu
- Right-click a file
- Select Share > Share to view who has access.
- Update or revoke permissions by clicking the dropdown next to a collaborator's name and choosing Remove access or adjusting access rights.

## STEP 9: Boost Accessibility

Add shortcuts to frequently accessed files or folders and use the description field to provide extra context.

### Example

- Right-click a file or folder, select Organise > Add Shortcut
- Choose the location where you want the shortcut to be

For descriptions:

- Right-click on a file or folder, select File/Folder information > Details
- Type a note in the Description box e.g., 'Contains all finalised invoices for 2024'.

## STEP 10: Stay Consistent

Use a clear naming convention to make files easy to locate and sort.

### Example

- Rename files by right-clicking and selecting Rename
- Use a format such as 'Project\_Client\_Date' or 'Year\_Category\_Detail' (e.g., '2024\_Finance\_Budget.xlsx')
- Apply this naming system consistently to new and existing files.

## **BONUS TIP:** **Commit to Maintenance**

Set a recurring calendar event to review your Drive monthly.

For example, spend 15 minutes every first Friday cleaning up your Drive

### **Example**

- Schedule the event in your Google Calendar
- Click on the drop down arrow next to where it says Doesn't repeat
- Select 'Monthly on...' (whatever day you schedule it for)



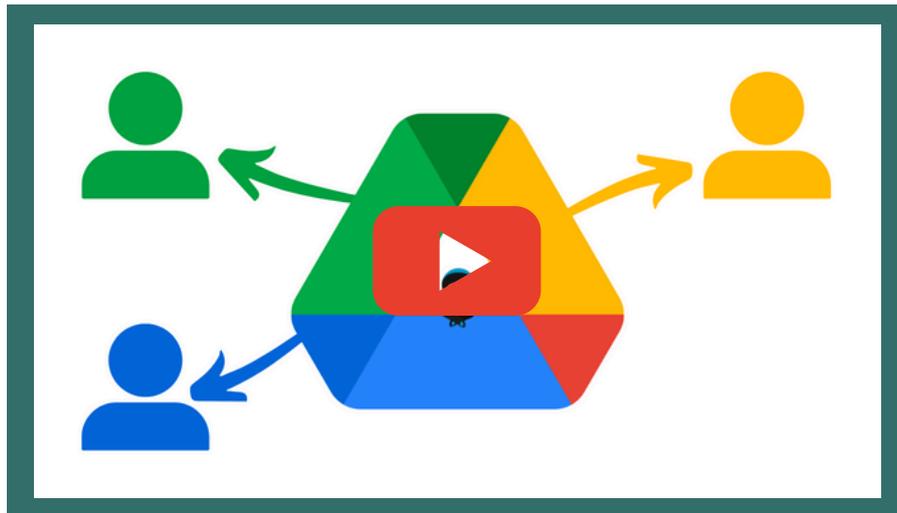
By scheduling this time in, you'll get into the habit of doing it, and not find it too much of a chore! Why not treat yourself to a little reward after you've done it each month 🎉

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## Want Even More?

Below are a couple of my video tutorials on Google Drive which you might find helpful...



And if you want to subscribe to my YouTube channel, please [click here](#).

Thanks!

*Sharon x*