Collection cleanup planner

Quick start and fictional worked example

Choose a small collection. Preserve originals, document authority, and test whether another person can retrieve the right version.

1. Choose one folder people already use. Keep its originals intact.
2. Confirm who can identify the official copy before renaming or moving files.
3. Write one small action, then ask someone else to find the right copy.

A useful finish: Another person can locate the authoritative copy and explain how its authority was confirmed.

FICTIONAL EXAMPLE / Adapt the process, not the facts.

Collection or folder	Fictional policy folder, three versions
Who uses it	Staff consulting the current policy
Person responsible	Policy owner, to confirm authority
Authoritative location	Approved PDF linked from the approval record, after owner confirmation
Naming rule	topic_status_version for working copies
Minimum metadata fields	Title, source, owner, status, version, approval reference
Duplicates to review, not delete	final.docx and final2.docx; keep until retention review
First action and review date	Confirm the approved version with its owner; review the retrieval test next week

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Your worksheet / Start here

Type into the boxes or print these two pages. Save a copy and reopen it to check your entries. For longer notes, use the text template or browser tool.

1. Collection or folder

Write enough for another person to follow your notes.

2. Who uses it

Write enough for another person to follow your notes.

3. Person responsible

Write enough for another person to follow your notes.

4. Authoritative location

Write enough for another person to follow your notes.

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Your worksheet / Continue and review

Type into the boxes or print these two pages. Save a copy and reopen it to check your entries. For longer notes, use the text template or browser tool.

5. Naming rule

Write enough for another person to follow your notes.

6. Minimum metadata fields

Write enough for another person to follow your notes.

7. Duplicates to review, not delete

Write enough for another person to follow your notes.

8. First action and review date

Write enough for another person to follow your notes.

Before you finish: Another person can locate the authoritative copy and explain how its authority was confirmed.

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