

File Collaboration Assessment Checklist

Centralization and Access

- ✓ We use a single platform for file storage and collaboration.
- ✓ Everyone on the team has access to the folders and files they need.
- ✓ Permissions are set correctly.
- ✓ We avoid saving files locally unless absolutely necessary.

Folder Structure and Organization

- ✓ Projects are organized into clearly labeled folders.
- ✓ Folder structures follow a consistent and logical format.
- ✓ It's easy to find files by purpose or project phase.

Naming and Version Control

- ✓ We use a consistent file naming convention.
- ✓ We avoid ambiguous file names like "FinalFinal" or "UseThisOne."
- ✓ Final versions are labeled clearly.
- ✓ We link to live versions or parent folders to avoid working from or using outdated copies.

Collaboration Practices

- ✓ We use tools that support real-time editing and commenting.
- ✓ Team members know where to leave feedback and how to tag others.
- ✓ There are clear guidelines for replacing or updating files.
- ✓ We use comments and track changes instead of editing documents directly to maintain transparency.

Maintenance and Training

- ✓ Outdated or duplicate files are cleaned up regularly.
- ✓ New team members are onboarded to the file system and conventions.
- ✓ The team reviews collaboration habits and adjusts when needed.

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