

Institutional Knowledge

What is file sharing, for 200 Alex?

Introduction

A fancy term and the top of the page begs the question, why Institutional Knowledge? My response is it's fancy! And it takes up more space. Each of our units is an institution, and we have volunteers that come and go throughout the years. How do we capture and keep the best of what they bring? You save it somewhere that will remain with the unit for years and you make sure that the administration of that can be passed down from year to year. There's no official adult leadership position for this, maybe it's the web host or maybe the secretary? It's possibly a committee position without title, there's plenty of room to make this happen within your unit.

Isn't file sharing complex and hard to do? Definitely not! Is it going to cost a lot of money? It doesn't have to. Services like Dropbox and Google Drive still offer free tiers that will work for most units. We're not sharing or storing pictures or movies here, use other services for that.

Things to look out for if going for a non-suggested option here, does it offer encryption in transit and encryption at rest? This prevents employees of the service as well as hackers who might break in to the service from reading your files. Remember, this file share may include rosters and names of children, so protecting that data should be a primary focus. Your next challenge is determining how easy is the file sharing, and does that user have to be a member of the service to properly have access to the files?

It's not just putting in to place a file share for your unit, you have to change the culture of your leaders and help drive adoption of this, or else it will wither and die. How many times has your company rolled out a shiny new piece of technology that nobody adopts because nobody takes the time to explain it and become the champion of it. Become the champion your unit deserves.

File Sharing Services

How do you know which one to pick? Stick with the standards, stick with the big guys? Dropbox, Google, and OneDrive are the biggest and the standards. Can one of the others work? Might they be marginally better? Do you work for them and you're like hey, give us a chance? Sure, if you're up to the challenge of implementing one of the other services don't let me stop you. There are a ton right ways to do this and only a few wrong ones. Don't want to have to decide? Skip down to my recommendation where I lay out why I choose Google Drive for this and how to set it up.

What to look for in a file share

As we discuss some of the services and as you consider maybe using one of the others out there, what are we looking for?

- File sharing capability – You need to be able to share your files, preferably with somebody who doesn't have an account on this file sharing service, sometimes called external sharing. Is it easy and can it be revoked?
- Storage limits – Some of these have a free tier ranging from 2 GB to 15 GB. How much space do you really need? Some units 2 GB will be fine. Don't use this service to store pictures. Some units

might need the 15 GB Google offers. Units shouldn't have to pay for storage. Maybe you piggy back off a leaders plan? That's ok, just make sure there's an off-ramp figured out before they decide to move on.

- Does it allow online editing? Can you edit and manipulate native documents from the web interface or does it require you download it, edit it, and then reupload it? Bonus points if it can synchronize to a folder on your computer. Double bonus points if you can use it from your mobile device.
- How hard is it going to be to convince people to use it? Everyone has heard of Dropbox, google, and onedrive. A lot of people have heard of box. If you use one of the other services out there, be ready to spend some time explaining what it is and why. This isn't a reason not to, it's something to consider.
- Ease of use – Does the mobile app add or subtract from usability? Can you synchronize to multiple computers, etc.

Dropbox

Not the original file sharing service, but one of the ones that's been around the longest and has lots of users. You can't go wrong here if you already have a family plan or your unit can afford the per year fee. The free account offers 2 GB of storage.

OneDrive

This one is handy to use if your charter already has a non-profit office 365 subscription and can add your unit to their subscription.

Google Drive

See below for my recommendation to set this up, this offers the most flexibility and a free 15 GB of storage that is likely way more than most units will ever need.

File Sharing Basics

Does the person your sharing this only need to view it or edit it? Some services provide a link you can send or ask for an email to send them an invite. Click around and get familiar with the mechanics of sharing files and folders.

Setting up the shares for your unit.

Identify the folders your unit wants and build those out. Share from the top-level folder if you want someone to have access to everything or just share a specific folder to the parent who helps you out with Blue and Gold programs every year.

Remove old users

Remember that you do need to review share permissions occasionally to make sure that leaders who moved on are no longer on the list. My recommendation here is to give people access at 1 or 2 top level folders only to keep management light. There shouldn't need to be a lot of hiding going on here.

Try not to email files

Email has an attachment capability but it was never designed to be your file sharing service. Share via link if possible, or if the file can be posted to your website for download by everyone, post it there and direct people in your email to go get the file from your website. It helps drive people to your site.

My recommendation

There is a lot of room in this topic to go with what works best for your unit. Maybe even too much room. Below, is my recommendation and how I would do a fileshare from scratch. For ease of use and maximizing free storage, Google Drive gives us the best bang for the buck here.

1. Sign up or use an already existing unit google account, something like pack1234Spring@gmail.com or any derivative of that. Make sure you take the steps to secure this account and share the password and an alternate email address with somebody else in your unit. If you need to create an account, write down the details as you set them up, either in a password file or new word or text document as you go so you can document these settings later.
 - a. Create account, select for personal use
 - b. Give it a name
 - c. Enter a birthday
 - d. Select an address
 - e. Create the password (keep it strong, use a password manager if you have it)
 - f. Add a recovery email address (use your personal or if there's another "shared" address somewhere you could select that) be sure to include this in the documentation.
 - g. Include a phone number, this helps secure the account
 - h. Skip "Get more from your number"
 - i. Review your information
 - j. Scroll to the bottom of the privacy and terms to select more options, select the 2nd option for each question:
 - i. Don't save web & app activity
 - ii. Show ads that aren't personalized
 - iii. Don't save youtube history
 - iv. Don't check the box for occasional reminders
 - k. If you are a chrome profile user, feel free to create a new profile, that way you can have multiple windows open with the different gmail inboxes in them.
2. Sign in to chrome with your new account, I would recommend creating a new chrome profile for this to help keep things separate.
3. Click on the 9 dots menu in the top right to select google drive
4. Click through any welcome to drive window that pops up.
5. You are now in your google drive, 15 GB of free file sharing space.
6. Create a folder structure (see that section below for examples)
7. Share it to your committee and other interested parents. (See the Google Drive File sharing notes above)

Folder Structure

Below are my recommendations to creating a structure. Do whatever makes sense to you and the rest of your committee. Be careful when sharing out folders that you consider the sub-folders already in that folder. Following these recommendations will share what you want while keeping private what needs to be kept private. In general, try to make as much as possible sharable. It's probably easiest to share from the top-most level you can and then if there is a sub-folder that needs to be adjusted then adjust it.

1. Committee - This is a place for committee specific items, agendas, treasurer reports, treasurer files, etc. Anything that doesn't belong to a specific event could be in the folder or sub-folders.
 - a. Meeting agendas – keep your agendas in the folder and share this out with everyone in your unit.
 - b. Marketing/Recruiting
 - c. Executive / Sensitive material – this could be for bank statements or other sensitive things a parent doesn't necessarily need to see. Disciplinary actions sort of stuff. Be careful with what is in here and use it sparingly.
2. Events – Create a folder for each of your events. I would be cautious about sharing out specific event folders to specific people, that's going to create a mess of shared information down the road, keep it simple and just share out from the events folder or even share out the top level folder.
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