



# Sponsored Projects Office Document Storage Process Guide

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Electronic document files of all types related to the proposing, processing and executing of Sponsored Projects are stored on a shared network drive, currently Wcsnov1\Opsdata\Share\SPO\ (G: drive).

**Access** Full access is provided to all departmental staff but limited to others except IT staff necessary to ensure the proper functioning and backup of the network file system.

**Control** Each Contracts Officer is responsible for the maintenance of his/her own electronic files. For the purpose of supporting each other's work when necessary, the files are organized and named in a standard way so that they can be easily identified and retrieved.

**Organization** At the Root level, each Contracts Officer has a computer folder labeled with their last name.

For example "Weiner"

Within the CO's folder, each Division that the CO supports is given a subfolder labeled with a two-letter abbreviation.

For example, Life Sciences would be labeled 'LS'.  
The file path would be "Weiner\LS"

In addition, there is a folder at the same level as the Division labeled SPAAS\_[CO name].

For example, "SPAAS\_Weiner".  
The file path would be "Weiner\SPAAS\_Weiner"

All SPAA PDFs (including the associated Award documents) for all divisions are stored in the SPAAS\_[CO name] folder. SPAA filenames must include the last 4 digits of the Award number and, in the case of a Master Award, also the Award number suffix. Filenames may also contain any other information that is meaningful to the CO.

### Suggested Additional Folders (optional):

Within each Division folder are subfolders labeled with each individual PIs last name (and first initial if needed to distinguish it from another.)

For example, in the LS folder would be a subfolder called "Bissell."  
... path ... "Weiner\LS\Bissell"

Within each PI folder would be subfolders for each proposal for the PI, labeled with the Sponsor Name and the last 4 digits of the RAPID proposal number.

For example, "GenomeTek\_1234". ...Path ...  
"Weiner\LS\Bissell\GenomeTek\_1234"

Inside the GenomeTek\_1234 subfolder might be a

- copy of the SPPF and sponsor forms (including e-application (pureEdge, etc.) ... grants.gov application or other)
- an electronic copy of the Reqs and Certs for the sponsor if this is the first proposal for the sponsor
- transmittal letters and other key correspondence with the Sponsor
- Subfolders for Amendments, Continuations and Closeout

Amendments, supplements and continuations documents may be in subfolders of the original proposal.

For example,

Weiner\LS\Bissell\GenomeTek\_1234\Amend1\_5678  
Using the RAPID proposal number as above.

See the diagram, below.

# SPO Document Storage on Shared Drive

