NAMING CONVENTIONS

Things to think about

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LIBRARIES

Records Management Session
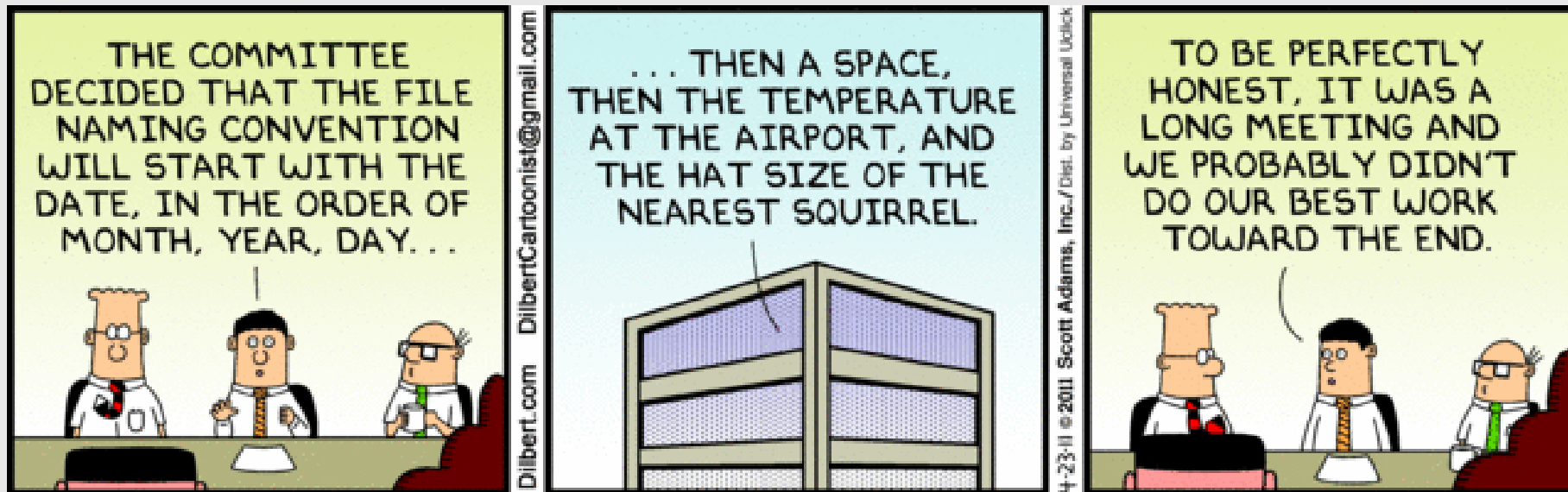
DALHOUSIE UNIVERSITY IS LOCATED IN MI'KMA'KI, THE ANCESTRAL AND UNCEDED TERRITORY OF THE MI'KMAQ. WE ARE ALL TREATY PEOPLE.

WE ACKNOWLEDGE THE HISTORIES, CONTRIBUTIONS, AND LEGACIES OF THE AFRICAN NOVA SCOTIAN PEOPLE AND COMMUNITIES WHO HAVE BEEN HERE FOR OVER 400 YEARS.

Mood Based Naming

Setting up Conventions

Rules that support the consistent filing of folders and files and enable efficient information retrieval.

Overview

HOW SEARCH

BIG TO SMALL

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Think About

➢How your unit searches

➢The order they appear in the system you are using
   ➢SharePoint - Columns
   ➢NAS [aka Shared Drive / O:Drive]

➢Chronological vs Alphabetical

➢How title looks when emailing attachments vs using links & sharing

➢Is this content to be put online?

Think about

➢Where Stored?

    ➢Master Record vs Content upload to a SharePoint site/page for external use.

    ➢Leveraging features of application or storage repository (e.g. NAS or MyDal & SharePoint sites)

    ➢Naming conventions can have an impact

    ➢Having a date in the document title can cause issues if uploaded to site/page that are linked to others (e.g. MyDal).

    ➢This creates Dead links

    ➢Version control of online content retained in SharePoint

Recommendations

➢ Do not include confidential information in folder or file names

➢ File names and paths should be meaningful, relevant and brief

➢ Think about how the use of CAPS, especially at the beginning of a file name – think about order

➢ Eliminate Symbols/Characters (e.g., [ ] { } ( ) .,! ; : " ' * ? < >\/ | &$)

➢ Online content – keep name consistent and do not use dates or version numbers

Abbreviations & Acronyms

Use approved abbreviations and acronyms.

List them & share with unit

Example: 2013-03-03 HR RPT.doc

Recommended abbreviations for record names

- Agenda (AGD)
- Agreement (AGR)
- Contract (CON)
- Discussion draft (DFT)
- Form (FRM)
- Grant (GRA)
- Guidelines (GUI)

- Index (IDX)
- Letter (LTR)
- List (LST)
- Memo (MEM)
- Minutes (MIN)
- Meeting (MTG)
- Notes (NTS)
- Plan (PLN)

- Policy (POL)
- Presentation (PRS)
- Procedure (PRC)
- Schedule (SCH)
- Speech (SPE)
- Summary (SUM)

BIG to small

➢ Use standard date formats (e.g., four-digit year, two-digit month, two-digit day: YYYY-MM-DD or YYYY-MM or YYYY-YYYY

➢ Name files by order of retrieval need (e.g., 2013-03-15 RPT.doc)

➢ Do not repeat folder names in the hierarchy

➢ Apply version control using V01, V02, etc. at the end of the file name

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➢ Folders/sub-directories should be named according to function or work service (examples: O:\Deans Council Meetings\2016-09-27 MIN.docx)

➢ Do not include confidential information in folder or file names

➢ Use numbers with zero filling to help sorting (examples: 001, 010)

Examples

Other Training Sessions

Digitizing Records - Things you should think about

Shared Drive Clean-up - Where do I start?

How long do I keep this stuff? DalCLASS can help with that!

Email Best Practices

Sending Records to Their Final Destination

Offered every term

Contact us

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