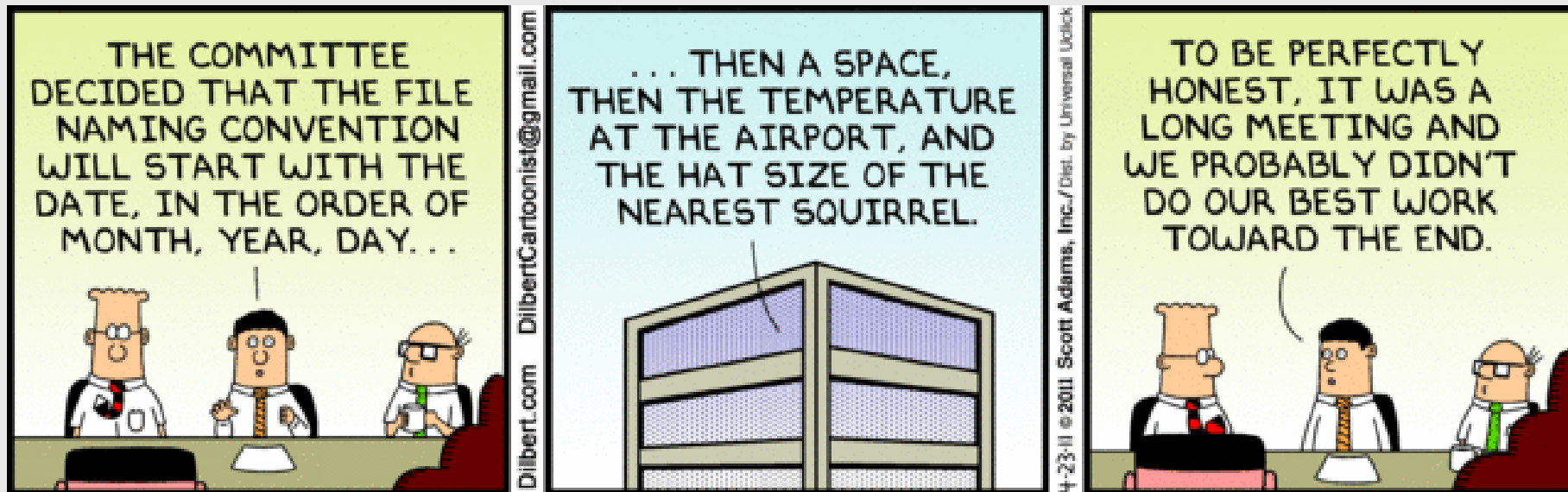


NAMING CONVENTIONS

Things to think about

Dalhousie University is located in Mi'kma'ki, the ancestral and unceded territory of the Mi'kmaq. We are all Treaty people.

Mood Based Naming



Setting up Conventions

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



HOW SEARCH



BIG TO SMALL



DALCLASS

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

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., [] { } () ., ! ; : " ' * ? < > \ / | & \$)

Abbreviations & Acronyms

Use approved abbreviations and acronyms.

List them & share with unit

Example: 2013-03-03 HR RPT.doc

Recommended abbreviations for records 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

DalCLASS

- 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 – OneDrive and NAS



Contact us

Records Management
Office

DalRM@dal.ca

Presenter:

Courtney Bayne, University
Records Manager

courtney.bayne@dal.ca