



Electronic Records Management: Naming Convention Tips and Examples

When organizing files within your office's shared drive system it is important to establish standardized naming conventions in order to ensure quick access to electronic records. All files in a shared drive should be easy to search, file names should all be unique, and file names should be agreed upon by all record creators and record users. The following tips will help maintain a well-organized shared drive system.

1. **Decide on naming conventions together** – Get group buy-in and involve all staff using the shared drive or electronic records management system.
2. **Document decisions** – Create a written policy for staff reference.
3. **Determine ways to describe:**
 - Date of creation (2015-11-30, Nov302015)
 - Associated work group or committee (SearchComm, OrientationComm)
 - Content of file (Minutes, Agenda)
 - Versions, using a leading '0' (v01, draft01)
4. **Order the elements in a name based on how the file will be retrieved.** For example, most meeting material such as minutes and agenda are retrieved by staff based on the date of the meeting

Example: **2015-11-30_SearchComm_Mins_v01.doc**