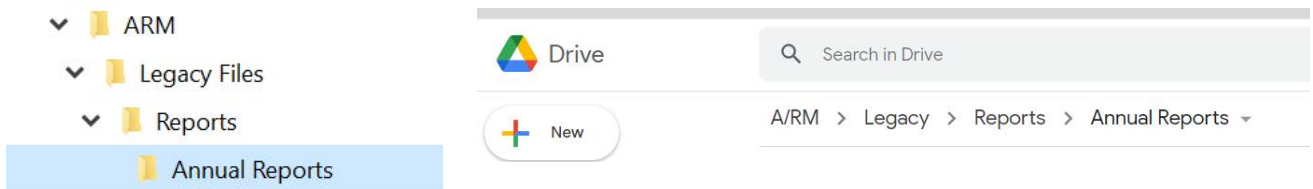


Folder Structure and Naming Convention

Folder Structure

- Any 3 or more files need a structure
- Structure your directory in terms of records series
 - A series is composed of similar records that fulfill a common purpose or have a common format.
 - Examples: financial, correspondence, presentations, agendas
- Create a hierarchy of folders and subsequent sub-folders for each records series
 - Examples:



- To avoid duplication, a file should only be retained in one format; either paper or electronic, not both.
- Lastly, a file should only be retained in the folder that it is best affiliated with. Do not keep the same file in multiple folders.

Establish a file naming convention

- Be unique, specific, and consistent
- Limit the character length -- no more than 25-35 characters
- Use leading 0s to facilitate sorting in numerical order (001, 002, ...010, 011)
- Use lowercase letters. If a name has more than one word, start each word with an uppercase letter (FileNameConvention_001.doc)
- Use numbers and/or letters NO special characters (#\$@*^&+)
- Use underscores instead of spaces
- Use international standard date notation (YYYY_MM_DD or YYYYMMDD)
- File Naming Examples:
 - finance_FY21Budget_v03_20180701.xlsx
 - RM_AccessPolicy_v01_20181011.docx

Remember information needs to be:

- Retrievable
- In a usable format
- Accessible
- Secured from inappropriate access
- Protected from inappropriate dissemination, modification or destruction
- Disposed of in accordance with the approved retention schedule

