

Establish naming conventions for electronic records. [Formerly ERM 11. Create Naming Convention for records maintained on a shared drive folder structure.]

Instructions for Using This Job Aid

Use this job aid when you are assigned to establish naming conventions for electronic records. Check off each step when you have completed the step.

Procedure	Actions/Decisions	
1. Establish naming conventions for electronic records.	1. Organize a meeting with end users to determine the current state (as-is) of naming conventions.	<input type="checkbox"/>
	2. Identify stakeholders.	<input type="checkbox"/>
	3. Assemble and share the materials that came out of the “as-is” meeting with the stakeholders you identified in the previous step.	<input type="checkbox"/>
	4. Organize a meeting with the stakeholders to brainstorm what the new naming convention will include. These new naming conventions should take into account the current state of any existing agency naming conventions and NARA guidance. NARA guidance states the following: <ul style="list-style-type: none"> • File paths should not exceed a total of 255 characters • Folders should not contain a period (.) • Folders should include only combinations of the characters a-z, the numbers 0-9, and underscores (_) and hyphens (-) • File names should not include more than one period (.). Usually this period is generated by the application that creates a file and precedes the application defined 3 or 4 character extension • File names should not contain spaces • File names should include only combinations of the characters a-z, the numbers 0-9, and underscores (_) and hyphens (-) 	<input type="checkbox"/>

Procedure	Actions/Decisions	
	<ul style="list-style-type: none"> File names should contribute to a file path that contains no more than 255 characters in total length 	
	5. Test the draft naming conventions by creating a test version of the files/folders, create test cases where participants use the naming conventions to name files and locate them, and ask participants to share lessons learned.	<input type="checkbox"/>
	6. Revise naming conventions based on lessons learned during testing.	<input type="checkbox"/>
	7. Send revised naming conventions to program management and stakeholders for review and comment.	<input type="checkbox"/>
	8. Revise naming conventions based on comments from program management and stakeholders.	<input type="checkbox"/>
	9. Send revised naming conventions to the ARO for review and approval.	<input type="checkbox"/>
	10. Share final version of the naming conventions with staff in preparation for the kickoff meeting.	<input type="checkbox"/>