

PressPress File Naming Conventions and History Tab Codes

Last Updated - July 2017

File Naming Conventions

For Site Reports -

LastNameFirstInitial_SiteReport_Date_TechInitials

For Example: WestN_SiteReport_7-17-2017_NW

Please note the use of underscore instead of spaces.

For Certification Pics:

LastNameFirstInitial_CertLevel_MonthYear

For Example: WestN_GoldCertification_July2017

For any other document that gets uploaded to the PressPoint record, i.e. an SWCD conservation plan or map, please use underscores instead of spaces and always end the file name with the month and year the file was created.

History Tab Subject Lines

Site Report – for uploading site reports (using the above file naming convention)

Backyard Habitat Super Star - for special notes about a particularly special story, especially active community member or participant journey

BHCP Volunteer – for indicating program participants that are also volunteers

Important Community Partner - for notes about important community partners, i.e. Baltimore Woods folks, Verde, Friends of Overlook Bluff, etc

Audubon Board/Staff Member

Land Trust Board/Staff Member

FoT Board/Staff

Follow-up Note - for any important follow-up conversation, email or phone, such as the quarterly follow-up calls. Just one note is needed for each communication. For example, if you leave a message and someone calls back, simply update the original note, rather than creating a new note.

Bought Plants in BHCP Plant Sale

Follow-up Email Sent – for Nikkie/JP as we send quarterly follow-up emails

Cert Visit Note – for notes about certification visits (usually these notes are created by volunteers and uploaded by JP), i.e. facebook blurbs

Non-Cert Visit Note – for notes about certification visits that did not result in a certification. For example “Volunteer Phil Harris visited in May 2016. There was still ivy at the site. Could not certify.”

Email Rejected – for situations where an email was rejected (note – this also requires checking the email invalid box, but it also helps to know *when* the email was rejected by this note in the history tab)

Renewal Notice Sent – for Nikkie/JP as we send quarterly renewal emails