Electronic Document Naming Guidelines

As more of our business is conducted electronically, the volume of electronic documents is increasing. Our ability to find, access and preserve these documents depends largely upon how we name them and where we save them. Below are guidelines for naming electronic document.

Guidelines

The key guideline is for the document name to provide, in as few characters as possible, enough information to determine what the document is and to enable retrieval.

Start the document name with the date and use YYYYMMDD format e.g. *20120912RIMStaffMeetingAgenda.docx* If just referring to a year always use four digits Eg *2012* not *12*	The date to use is the significant date relevant to the document (e.g. version or published date, or in the case of minutes or agendas, the date of the meeting itself). If all documents have the date at the beginning then sorting them in this order can be useful. Sorting by "Date Modified" isn't always meaningful.
Keep document names short – up to 50 characters e.g. *20120921UsingPaperFiles.pdf*	**Long file names can lead to problems opening, saving, copying, backing up or restoring your document.** The name you give the document is only part of the full file name hence the need to keep it short. The full file name includes the server and folders that the document sits within e.g. *L:\PER\VC\Shared\OUA\OUS\PCS\RIM\Information Management\Training\Advice Sheets\2012\ 20120921UsingPaperFiles.pdf* Problems occur if the full file name is over 256 characters, so keeping your document name short should help reduce issues.
While keeping the name short, be specific and use terms that accurately describe the subject or topic of the document eg *20120823RIMStaffMeetingMinutes.docx*	This will make it easier to search for the document. Also, remember that others may need to find the document in the future, so by choosing words that reflect the content of the document they have a better chance of finding it.
Leave out words like…. in, of, if, but, so, and, for, the.	
Acronyms can be used, but ensure that they are standard acronyms, like ACCS and others that you all know and understand about.	If your acronym isn't already on the ACCS acronym list then you can add it.
Don't use abbreviations (e.g. ctte for committee). Use the full word instead.	While it may help to reduce the length of the document name, others may not understand your abbreviation or not think to search on it.

Don't leave spaces between words in the document name. Capital letters can be used to delineate words e.g. *20120311RecordsTrainingQuiz.docx*	By removing spaces, the file name will be shorter. **<u>Search Tip</u>** – when searching for document names in Windows Explorer by keywords, place an asterisk before the keyword as this will pick up any words in a document name that have been joined together e.g. Search for ***quiz** instead of just **quiz**
The following characters are **not** recommended in your document name: **, ; : = \ / * ? " < > |**	Some systems have difficulty with these characters which may result in problems saving and sharing the document.
Add version information to the end of the document name instead of "draft" or "final" – e.g. *20120909DocumentNamingGuidelinesV1.0.docx* | V0.1	First draft | |------|------| | V0.2 | Second draft | | V1.0 | Final approved version | | V1.1 | Minor revision | | V2.0 | Major revision |	Version control allows you to efficiently track the different versions of a document.

Examples

Good file names	Bad file names
20120521OHSCommitteeMeetingMinutes.docx	Minutes of Occ Health and Safety Committee meeting May 2012.docx
20111118RecordsManagementProceduresV1.0.pdf	Procedure document for Records Mgt.pdf
20120216CCVUsageReportV0.1.docx	Report on CCV usage – draft – 16 Feb 12.docx
20100730SOLTrainingFeedback.xlsx	July 10 online training stats.xlsx

KEEP YOUR FOLDER NAMES SHORT AND SWEET
ALWAYS HAVE AN ARCHIVE AND AN ADMIN FOLDER

NEVER GO MORE THAN 4-FOLDER LEVELS DEEP
ALWAYS NAME YOUR FILES SOMETHING DESCRIPTIVE
NEVER LEAVE A BLANK SPACE IN FILE NAMES

Elements should be ordered from general to specific detail of importance as much as possible.