

File Naming Convention Best Practices

Elements of a File Name

What is it?

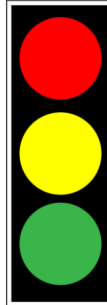
- Document Type (*not* file type, .doc, .PPT, .PDF)

Who/what does it represent?

- Group
- Unit
- Person
- Case/Project

When?

- Date of meeting



Minutes.docx

Minutes-Exec-Committee.docx



Minutes-Exec-Committee-20191021.docx

[What] [Who] [When]

Hint:

A file name should be clear and concise, yet include sufficient description for the file to stand on its own, **independent of where it is stored**. (If you removed the file from the file structure would you still know what it was?)

Standardization Tips

Category		
Grammar: <ul style="list-style-type: none"> Noun then Adjective 	Minutes-Web-Governance-20150728.docx Compound nouns: File-Naming-Convention.docx	Web-Governance-Minutes-20150728.docx If not using a compound noun, this appears to be a convention/conference about file naming: Convention-File-Naming.docx
Readability: <ul style="list-style-type: none"> Capitalize every word 	File-Name.docx	file-name.docx
Special Characters: <ul style="list-style-type: none"> Use a dash between every word No spaces or underscores 	Dash – Parenthesis () File-Naming-Convention-20150810-(v02).docx	\ / ; ! @ # \$ % & * [] < > . , _ With spaces: File Naming Convention 201002.docx Becomes: File%20Naming%20Convention%20201002.docx With underscores (when part of a link): File_Naming_Convention_201002.docx Becomes: <u>File_Naming_Convention_201002.docx</u>

Dates: <ul style="list-style-type: none"> Format: YYYYMMDD Placement: at the end of the file name 	YYYYMMDD: 20201020 Similar document types are sorted together alphabetically: Annual-Report Exhibits-Committee-20150630.docx Annual-Report Web-Governance-Committee-20141231.docx Minutes Web-Governance-Committee-20150229.docx Minutes Web-Governance-Committee-20150728.docx	These can be interpreted as MMDD or DDMM: 10022020 10-02-2020 02-10-2020 Oct2020 Date first will sort chronologically, lumping different document types together: 20141231 Annual-Report Web-Governance-Committee.docx 20150229 Minutes Web-Governance-Committee.docx 20150630 Annual-Report Exhibits-Committee.docx Annual 20150728 Minutes Web-Governance-Committee.docx
Versioning: <ul style="list-style-type: none"> Consistency Status Notation 	Zero-fill for sorting: v01, v01, v03 ... v10, v11 Also acceptable: Version02 (v02) Status notation: Final Superseded	Without zero fill, files will sort by all 1s, then all 2s, etc. Sort order will be: v1, v10, v11, v2, v20, v3, v4, Not acceptable: Version2 –or-v2 –or-(v2)
Spelling or abbreviations: <ul style="list-style-type: none"> Always be consistent 	Minutes-Web-Governance-Committee-20150113.docx Minutes-Web-Governance-Committee-20150217.docx Minutes-Web-Governance-Committee-20150317.docx	Minutes-Web-Gov-Committee-20150113.docx Minutes-WebGovernance-20150217.docx Minutes-WG-Committee-20150317.docx
Order of elements	Always: What-Who-When	Not: When-Who-What What-When-Who Who-What-When

A unified departmental approach to consistency, uniformity and standardization is key!

- Establish a small working group to consider records that multiple people create/receive
- For each record type, consider the most logical sorting and nesting file structures
- Document the naming conventions and share with your unit