

File Naming Conventions & Version Control

Decide on a file naming convention to use whenever you create a document. Useful file names:

- are consistent;
- are meaningful to you and your coworkers; and
- allow you to find the file easily

It is useful if your department agrees on the following elements of a file name:

Vocabulary – choose a standard vocabulary for file names so that everyone uses a common language.

Punctuation – decide on conventions for if and when to use punctuation symbols, capitals, hyphens and spaces.

Dates – agree on a logical use of dates so that they display chronologically e.g., YYYYMMDD (this is the ISO standard date format).

Order - confirm which element should go first, so that files on the same theme are listed together and can therefore be found easily.

Numbers – specify the number of digits that will be used in numbering so that files are listed numerically (for example, 01 or 001)

Version Control

The information below is less relevant if you are creating documents using applications that have version control built in (e.g., Google Docs), but is a good way to think about how to make sure you are always working in the correct version of a document.

Few documents are drafted by one person in one sitting. More often there will be several people involved in the process and it will occur over an extended period of time. Without proper controls this can quickly lead to confusion as to which version is the most recent. Here is a suggestion of one way to avoid this situation:

Use a 'revision' numbering system. Any major changes to a file can be indicated by whole numbers, for example, v01 would be the first version, v02 the second version. Minor changes can be indicated by increasing the decimal figure for example, v01_01 indicates a minor change has been made to the first version, and v03_01 a minor change has been made to the third version.

When draft documents are sent out for revision, they should return carrying additional information to identify the person who has made the changes. Example: a file with the name policy_v01_20100816_sj indicates that a colleague (sj) has made changes to the first version on August 16, 2010. The lead author would then add those changes to version v01 and rename the file following the revision numbering system.

Include a 'version control table' with each important document, noting changes and their dates alongside the appropriate version number of the document. If helpful, you can include the file names themselves along with (or instead of) the version number.

Agree who will finish finals and mark them as 'final.' Final versions can be saved as PDFs so that they are "fixed" and are not changeable.

- Sponsored Research Records
- Transfer of Records to the University Archives
- Vital Records Identification and Management
- How to Read and Implement a Record Retention Schedule

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