# **Case for Naming Conventions**

## Benefits

* Naming files/folders in a consistent, logical, and predictable way helps information be located, identified, and retrieved by yourself or colleagues, as quickly and easily as possible.
* The simple rules apply equally to electronic and physical files and folders. They provide assurance that the correct item is retrieved and cannot be confused with other documents.
* The file name describes, at a glance, what the document is about, making it easier to browse files more effectively and efficiently.

## To get the best results, naming conventions should:

* Ensure the elements in a file name are ordered, unique, and consistent in such a way as to help the quick retrieval of the file, while offering flexibility so departments can decide most relevant order for their files.
* Be adopted from the point of creation of a document. It is not proposed to retrospectively review the naming conventions that are currently in place unless a strong business reason exists.
* Make sure documents can be identified on their own - not dependent on the folder they are saved in. It is recommended that the file name and path is included in the footer of a document.

## Key Values

1. *Keep file names short and meaningful.* 
   1. *Avoiding unnecessary repetition and redundancy in file names and paths.*
   2. *Use capital letters to delimit words, not spaces or underscores.*
   3. *Use abbreviations and codes; avoiding obscure acronyms and vague, ie.’ “miscellaneous”.*
2. *Use alphanumeric characters i.e., letters (A-Z) and numbers (0-9), to ensure correct numerical order (e.g., 01, 02). {Avoid: \*: \ / < > | “? [ ] ; = + & £ $ ,}*
   1. *Use a two-digit format unless it is a year or another number with more than two digits.*
   2. *Records for recurring events should include the date and a description of the event name.*
   3. *The version number of a record should be indicated in its file name by the inclusion of ‘V’ followed by the version number. (e.g., v01, v03 etc.)*
3. *Order the elements in a file name in the most appropriate way to retrieve the record.*
   1. *Avoid common words like ‘Draft’ or ‘Letter’ at the beginning of the name unless used in file name makes it easier to retrieve the record.*
   2. *Indicate what is significant/what the file contains, what is searched for, who is the audience.*
   3. *Knowledge Base Article Number (KB#) should be included at the end of the name to make references in ServiceNow.*
4. Keep file names short and meaningful.

Long names mean long file paths, decreasing likelihood the location and correct file will be found.

Use abbreviations that are commonly understood; this is particularly important for records which have to be kept for a long period of time as the meaning of the acronym may not be known over time.

* 1. **Avoid unnecessary repetition and redundancy in file names and file paths.**

Unnecessary repetition increases the length of file names and paths.

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|  | **Recommended** | **Incorrect** |
| **File** | /.../Meetings/20240130Notes.doc  /.../Training/Onboarding.doc | /.../Meeting/20240130MeetingNotes.doc  /.../Training/OnboardingTraining.doc |
| **Logic** | **Ex. 1:** The folder is called “Meetings”, so it is not necessary to include the word “Meeting” in the file name, as all the records in that folder are Meeting Notes.  **Ex. 2:** The folder is called “Training”, so it is not necessary to include the word “Training” in the file name because all the records in that folder are training records. | |

1. **Use capital letters to delimit words, not spaces or underscores.**

Some search functions have difficulty recognizing names with spaces, underscores, and hyphens, or are more case sensitive and will ignore those items.

Where capitalized acronyms are used in file names, the acronym should appear in capitals and the first letter of the following word should also be capitalized.

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|  | **Recommended** | **Incorrect** |
| **File** | NamingConvention.doc  HWRFInstructions.html  HardwareReceiptForm.doc | Naming\_Convention.doc  HWRF\_instructions.html  Hardware Receipt Form.doc |
| **Logic** | Removing the space or underscore reduces the length of the file name but by using capital letters to differentiate between the words, the file name is still readily recognizable. | |

1. **Use a two-digit format unless it is a year or another number with more than two digits.**

File directories display file names in alphanumeric order. To maintain this order when file names include numbers, use alphanumeric characters i.e., letters (A-Z) and numbers (0-9) [use at least two-digit numbers to ensure correct numerical order (e.g., 01, 02)].

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|  | **Recommended** | **Incorrect** |
| **File** | HardwareReceiptFormv01  HardwareReceiptFormv02  HardwareReceiptFormv10 | HardwareReceiptFormv1  HardwareReceiptFormv10  HardwareReceiptFormv2 |
| **Logic** | This example shows the successive versions of a document. This includes the versions created as the document was developed from the initial document (V01) through to the latest approved document (V10) [ subsequent minor revisions would be v1.1]. | |

1. **Records for recurring events should include the date and a description of the event in the file name.**

Write dates ‘back to front’, with the year first (four-digit number), followed by the month (two-digit number), and the day (two-digit number). YYYYMMDD or YYYYMM or YYYY or YYYY-YYYY. Dates should follow same format: YYYYMMDD e.g., 20170425.

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|  | **Recommended** | **Incorrect** |
| **File name** | 20130324Agenda.doc  20130324Minutes.doc  20130324AP13-53-01Exceptions  20130201Agenda.doc  20130201Minutes.doc | 1Feb2013Agenda.doc  1Feb2013Minutes.doc  24March2013Agenda.doc  24March2013Minutes.doc  24March2013AP13/53/01 |
| **Justification** | If dates are listed back to front, the chronological order of the records is maintained when the file names are listed in the file directory. This helps when trying to retrieve the latest dated record. | |

1. **Use common words like ‘Draft’ in file names to make it easier to retrieve the record.**

Avoid at the start of file names, or all of those records will appear together in the file directory, making it more difficult to retrieve the records you are looking for.

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|  | **Recommended** | **Incorrect** |
| **File name** | /…/Training/  RequetsV01Draft.doc RequestsV05Final.doc HardwareReport2012-2013V20Final.doc HardwareReport2012-2013V15Draft.doc HotelingS20120312.doc  OfficeProceduresV10Draft.doc | /…/Training/  DraftRequests.doc  DraftBudgetReport2012-2013.doc  DraftOfficeProcedures.doc  FinalAdvertising.doc  FinalBudgetReport2012-2013.doc  LetterAThomas.doc  LetterSGrant.doc |
| **Justification** | The file directory will list files in alphanumeric order. This means that all records with file names starting “Draft” will be listed together. When retrieving files, it will be more useful to find the draft budget report next to the previous year’s budget rather than next to an unrelated draft record. | |

1. **Order the elements in a file name in the most appropriate way to retrieve the record.**

The elements in a file name should be ordered according to the way in which the record will be retrieved during the course of everyday business. E.g., if the records are retrieved according to date, the date element should appear first.

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|  | **Recommended** | **Incorrect** |
| **File name** | /…/HardwarePolicyCttee/  20120630Agenda.doc  20120630Minutes.doc  20130120Agenda.doc  20130120Minutes.doc  20130201Agenda.doc  20130201Minutes.doc  /…/Events/  Staff Barbecue20110630.doc  TimesHigherAwards20120905.doc  Chancellor’sDinner20130304.doc | /…/HardwarePolicyCttee/  Agenda1Feb2013.doc  Agenda20Jan2013.doc  Agenda30June2012.doc  Minutes1Feb2013.doc  Minutes20Jan2013.doc  Minutes30June2012.doc  /…/Events/  20130304Chancellor’sDinner.doc  20110630StaffBarbecue.doc  20120905TimesHigherAward.doc |
| **Justification** | The first example shows minutes and agenda of the Academic Policy Committee. Minutes and papers of a meeting are likely to be retrieved on the basis of the date of the meeting, it is therefore best to have the date at the start of the file name, otherwise all the Agendas will come at the top of the directory list, followed by all of the minutes, and then by the papers. The second example shows the file names of the files in the Events folder. Because events are likely to be retrieved by the name of the event rather than the date of the event, it is most useful to have that element first. | |

1. **Use capital letters to delimit words.**

Although underscores (\_) or hyphens (-) may add clarity, they make the file name longer. Avoid invalid characters in file names such as \*? \ / : # % ~ { }.

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|  | **Recommended** | **Incorrect** |
| **File** | CaseforNamingConventions.doc | The\_Case\_for\_Naming\_Conventions.doc |
| **Logic** | Some words *add* length to a file name but do not contribute towards the meaning, (e.g., “the”, “a”, “and”) where the remaining words are meaningful within the context of the file directory these elements can be removed. Standard abbreviation, e.g., “SOP”, standard for “Standard Operating Procedure”. | |

1. **The version number of a record should be indicated in its file name by the inclusion of ‘V’ followed the version number and, where applicable, ‘Draft’ or ‘Final’.**

Some records go through a number of versions, for example they start out as working drafts, become consultation drafts and finish with a final draft, which may then be reviewed and updated at a later date. It is important to be able to differentiate between these various drafts by giving them each their own number. A document becomes version 1.0 when it is approved (FilenameV10).

Where a version number is applicable, it should always appear in the file name of the record so that the most recent version can be easily identified and retrieved.

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|  | **Recommended** | **Incorrect** |
| **File name** | LTAS2009-2010V03Draft.htm  LTAS2009-2010V10Final.htm  OrgHier2012V02.xls  OrgHier2012V03.xls  OrgHier2012V10.xls | LTAS2009/10\_draftv.3.htm  LTAS2009/10\_finalv1htm  Org\_Hier\_2012\_v.2.xls  Org\_Hier\_2012\_v.3.xls  Org\_Hier\_2012\_v1.xls |
| **Justification** | The first example shows two versions of the Learning, Teaching and Assessment Strategy for 2009-2010, version 03 is a draft version and version 10 is the final version. The common abbreviation for the strategy is used. The years are given in four-digit format. The version number is given with two digits so that the versions will appear in numeric order.  The second example shows a number of versions of the organizational hierarchy for 2012. In this case none of the versions are marked as draft or final because the nature of the record means that ‘draft’ and ‘final’ are not applicable. | |

1. **Avoid using non-alphanumeric characters in file names.**

Different operating systems (e.g., Linux, OS X, Windows) have different file name requirements, in particular different characters that they do not recognize in file names.

The use of these characters can cause problems. Even if your operating system allows you to save the file you may encounter difficulties if you try to transport the file to another operating system, for example the file may not be recognized, or if you send it to someone else, they may not be able to open it. It is therefore recommended that you avoid the use of non-alphanumeric characters in file names

Avoid: \*: \ / < > | “? [ ] ; = + & £ $ , . However, hyphens (-) may be used.

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|  | **Recommended** | **Incorrect** |
| **File name** | SmithJohn20130507.txt DavidLaingCollection.rtf GuidelinesAndRegulations.pdf  Budget2012-2013 | Smith,John20130507.txt "DavidLaingCollection".rtf Guidelines&Regulations.pdf  Budget2012/13 |
| **Justification** | Most non-alphanumeric characters can be omitted without much loss of meaning, e.g., commas and quotation marks. Others can be replaced with alphanumeric characters, e.g., "&" and "+" can be replaced with "And" and "Plus". Hyphens can be used in place of forward slashes and brackets. | |