

# Naming Conventions Guidelines

Naming files and documents consistently, logically, and in a predictable way will distinguish similar files from one another and facilitate the storage and retrieval process. Naming documents according to agreed conventions will make file naming easier. It will also enable users to browse file names more effectively and efficiently and find what they need without having to guess.

## Benefits of using naming conventions

- Facilitates better access and retrieval of documents
- Allows the sorting of documents into a logical sequence
- Helps users identify the items they are looking for easily

## File Names

The path to a specified file consists of one or more components, separated by a special character (a backslash), with each component usually being a directory name or file name.

The following fundamental rules enable applications to create and process valid names for files and directories, regardless of the file system:

- Do not assume case sensitivity. For example, consider the names OSCAR, Oscar, and oscar to be the same.
- Do not use the following reserved characters:
  - < (less than)
  - > (greater than)
  - : (colon)
  - " (double quote)
  - / (forward slash)
  - \ (backslash)
  - | (vertical bar or pipe)
  - ? (question mark)
  - \* (asterisk)
- Do not use the following reserved names for the name of a file:
  - CON, PRN, AUX, NUL, COM1, COM2, COM3, COM4, COM5, COM6, COM7, COM8, COM9, LPT1, LPT2, LPT3, LPT4, LPT5, LPT6, LPT7, LPT8, and LPT9.

Avoid using these reserved names followed immediately by an extension; for example, NUL.txt is not recommended.

- Do not end a file or directory name with a space or a period. Although the underlying file system may support such names, the Windows shell and user interface does not.

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## Documents

### General rules

- There is a 256 character limitation for the file path. Thus:
  - Keep document names short but meaningful.
  - Try to keep filenames to 20 characters or less.
- Don't use common words unless they help with retrieval
  - For example: Letter, draft etc.
- Avoid repetition of common words or folder names
  - Example: /.../**Procedures**/Appeals**Procedures**.doc
- Document names should accurately describe the document contents
- The document name should make sense to others if the creator is unavailable.
- Use capital letters to delimit words when possible; not spaces or underscores.
  - Example: "RiskManagement.doc" instead of "Risk\_management.doc"
- Use document metadata where appropriate instead of including in the document name.
- Order the elements in a file name in the most appropriate way to retrieve the record.
  - Example: If the records are retrieved according to their date, the date element should appear first. If the records are retrieved according to their description, the description element should appear first.
- The file names of records relating to recurring events should include the date and a description of the event.
  - Example: /.../Accounting/  
Budget2013-2014V10.xls  
Budget2014-2015V01Draft.xls
- The file names of correspondence should include the name of the correspondent, an indication of the subject, the date of the correspondence and whether it is incoming or outgoing correspondence.
  - Example: /.../  
EvansWAppeal201040715rcvd.doc  
EvansWAppeal201040820.doc
- The file name of an email attachment should include the name of the correspondent, an indication of the subject, the date of the correspondence, 'attch', and an indication of the number of attachments sent with the covering email.
  - Example: /.../Complaints/  
BloggsJ20131205attch01of02.pdf  
BloggsJ20131205attch02of02.pdf
- Avoid using the non-alphanumeric characters in file names, such as: \* : \ / < > | " ? [ ] ; = + & £ \$ , . However, hyphens (-) may be used.

# Naming Conventions Guidelines

## Names

- If needed, write the name of a person as last name followed by initial.
- Only use the individual's rank or title if it is relevant to your business

This	Not This
SmithBAwardCeremony	Award Ceremony, B. Smith

## Subject

- Write the subject in full using title case (first letter each word capitalized)
- Write names and proper nouns with a capital letter

This	Not This
OfficePolicyWorkpapers	Workpapers for the policy

## Punctuation

- Try not to use punctuation as it can affect searching
- Use dashes between words rather than spaces. Spaces can make web addresses difficult to read.
- Avoid underscores. They may affect indexes and search in some applications

## Numbers

- Use two digit numbers when using a numbers in a document title to keep the documents in numerical order
  - 01, 02, 03 etc.
- Numbers will be sorted from the left.
- May need to “zero fill” to ensure sorting.

Sorting with zero fill	Sorting without zero fill
0100	100
0110	1000
0120	1001
1000	110
1001	120

## Dates

- Write the date backwards using a hyphen to separate the year, month and day
  - YYYY-MM-DD
  - YYYY-MM
  - YYYY
  - YYYY-YYYY

This	Not This
2016-AnnualBudget	2016 \$\$\$\$
2016-11-SafetyPlan-D	Draft Plan November

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## Versions/drafts

- Use the letter 'V' to indicate a version
  - Use numbers to indicate major and minor versions
    - Major version: V02.0
    - Minor version: 02.01
- Use the letter 'D' to indicate a draft

This	Not This
OfficeProcedure-V01.0	Office Procedure v1
OfficeProcedure-V01.01-D	Draft Office Procedure v1-1

## Order of document name

- Write the date first and then the subject
  - This keeps the documents in chronological order as they would be in a paper file
  - It is easier to sequence the folder as the last action date can be easily determined

This	Not This
2016-03-24Agenda	24 March 2016 Agenda
2016-04-26Minutes	Minutes-Apr. 24, 2016