

# Service Alberta – Information Management

## Electronic Document Naming Conventions

### 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

### General rules

- Keep document names short but meaningful.
- There is a 255 character limitation
- Don't use stop words
  - If, but, so, for etc
- Don't use common words unless they help with retrieval
  - Letter, draft etc
- Avoid repetition
- 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.
- Use document metadata where appropriate instead of including in the document name.

### Date

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

### Subject

- Write the subject in full using sentence case (first letter of the sentence capitalised and all others in lower case)
- Write names and proper nouns with a capital letter

### Names

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

### Punctuation

- Try not to use punctuation as it can affect searching
- Use underscores between words rather than spaces. Spaces can make web addresses difficult to read.

### Numbers

- Use two digit numbers when using a numbers in a document title to keep the documents in numerical order
  - 01, 02, 03 etc

### Versions/drafts

- Use the letter 'v' to indicate a version  
*Only use if your system is not using built-in version control*
- Use the letter 'd' to indicate a draft

### 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

- Don't use abbreviations for words

### Large documents

- Use the word chapter, section or part to accurately describe the document. These can be abbreviated if necessary
- Number each section to keep it in order

### Acronyms and abbreviations

- Don't use acronyms.

### Examples

This	Not This
2006-03-24_Agenda	24 March 2006 Agenda
2008-09-24_Minutes	Minutes-Sept. 24, 2008
OfficeProcedures-v01	Office Procedures v1
SmithB_AwardCeremony	Award Ceremony, B. Smith
2008_AnnualFinancialStatement	2008 \$\$\$
2007-12_ECM_Minutes_d	Draft Minutes December

### References

"Fact Sheet – 8. Electronic Document Naming Conventions." Curtin, University of Technology.  
[http://records.curtin.edu.au/includes/docs/fact\\_sheets/Fact\\_Sheet\\_8\\_-\\_Electronic\\_Document\\_Naming\\_Conventions.pdf](http://records.curtin.edu.au/includes/docs/fact_sheets/Fact_Sheet_8_-_Electronic_Document_Naming_Conventions.pdf)

"Naming Conventions for Electronic Files and Folders." York University, 2007.  
<http://www.yorku.ca/secretariat/infoprivacy/infotoolkit/docs/TipSheet6NamingConventionsEFilesFolders.pdf>

"Standard Naming Conventions for Electronic Records: The Rules." University of Edinburgh, 2007.  
<http://www.recordsmanagement.ed.ac.uk/InfoStaff/RMstaff/RMprojects/PP/FileNameRules/FileNameRules.htm>

