

WHITNEY

File Naming Conventions

Considerations

A file name is the chief identifier for a record. In the world of electronic records, the record's file name provides metadata that places the record in context with other records, records series, and records retention schedules. Consider establishing a department-wide file naming policy that complements your electronic records management strategy. Electronic records will be moved from their original location. Files are frequently copied to other folders, downloaded, and emailed. It is important to ensure that the file name is sufficiently unique and descriptive independent of the original file structure or context. The file name should include necessary descriptive information independent of where it is stored.

GUIDELINES

1. Use underscores (_) or hyphens (-) instead of spaces or periods.
2. Avoid using overly complex or lengthy filenames. Use 30 or fewer characters whenever possible.
3. Use YYYY-MM-DD for dates.
4. Avoid Special Characters:
\\ : * ? " | [] & , . " * : < > ! @ ; = [] ^ { } ~
5. Be consistent. Include the date and abbreviations at the end of the filename. Ensure everyone in your department is following the protocol consistently.

QUALIFIERS

1. Use a filename that includes all necessary descriptive information independent of where it is stored.
 - Necessary qualifiers include: Title, Creator/Author/Editor, Date, Version number.
2. Include version numbers to easily manage drafts and revisions.
 - Ex: "v01, v02, v03"
 - Use FINAL to indicate a final draft.

EXAMPLES

- Heilmann_contract-2015-10-01.doc
- Heilmann_checklist_v01.doc
- Heilmann_checklist_FINAL.doc