

Information Management Guidance

File Naming

Naming records in a consistent, logical and predictable way facilitates the efficient storage and effective retrieval and management of records. The use of agreed conventions also makes file naming itself easier, because once rules have been established and learned decisions on naming do not need to be rethought each time.

In order to achieve this follow the 7 principles below:

1. Keep file names short, but meaningful

Names must be meaningful and convey an idea of content. To ensure meaningfulness, the use of initials, abbreviations and codes that are not commonly understood should be avoided.

Example:

	Correct	Incorrect
File Name	HaggisNNeepsCtteeRemit.rtf	The_haggis_and_neeps_committee_remit.rtf
		HagNepComRemit.rtf

2. Avoid unnecessary repetition and redundancy in file names

Example:

	Correct	Incorrect
File Name	/.../Board/20041030Minutes.rtf	/.../Board/20041030BoardMinutes.rtf

3. Use capital letters not spaces, underscores or hyphens to distinguish each word in a file name

Example:

	Correct	Incorrect
File Name	RiskManagement.rtf	Risk_management.rtf or Risk management.rtf

4. When including a number always use at least a two-digit number

This maintains the numeric order when listed in the file directory.

Where a version number is applicable it should be included in the file name with a V preceding it.

Example:

	Correct	Incorrect
File Name	OfficeProceduresV01	OfficeProceduresV1

5. If using a date always state the date 'back to front', and use four digit years, two digit months and two digit days: YYYYMMDD or YYYYMM or YYYY or YYYY-YYYY

This maintains the chronological order of the records when listed in the file directory.

Example:

	Correct	Incorrect
File Name	20090324Agenda.rtf 2012-2013Budget.rtf	24Feb2009Agenda.rtf 12-13Budget.rtf

6. Avoid using common words such as 'draft' or 'letter' at the start of file names

Using common words such as 'draft' or 'letter' at the start of file names will result in all of these unrelated records appearing together in the file directory making it harder to identify related records.

Example:

	Correct	Incorrect
File Name	AdvertisingV01Draft.rtf AdvertisingLetter.rtf	DraftAdvertising.rtf LetterAdvertising.rtf

7. When including a personal name give the family name first followed by the initials

However, it is not usually appropriate to name records after the record owner or creator, i.e. avoid naming records after yourself. Any personal name used should refer to the content.

Example:

	Correct	Incorrect
File Name	KirkJTCorrespondence20091201.rtf	JamestKirkcorrespondence20091201.rtf

When developing naming conventions these should be discussed and agreed as a team in order that everyone is clear on what they are. Included in this discussion should be an agreement of the terminology to be used, for example are you going to use letter or correspondence and if you are going to use abbreviations or acronyms what these will be.

For further guidance contact the Records Manager, Kirsty Hurt x5229