File Naming Conventions

File naming conventions vary between departments depending on work, types of records and platforms worked with, and possibly retention scheduling. While there are no university-wide file naming rules, Corporate Records and Archives advises departments to create consistent and easy-to-remember guidelines for their staff. A key goal for file naming conventions is that they should be a balance between concise and providing enough information for efficient retrieval.

Naming Guidelines

1. Key elements of file and folder names include:
   - Subject, type or activity
   - Department, Committee, Work unit identifier
   - Date
   - Version

2. Name files focusing on retrieval and/or to facilitate retention and disposition.
   If files are being retrieved by description, name from the general to the specific:
   - e.g. MinutesMeeting305_BoardofGovernors_20210927
   - e.g. Presentation_ArchivesMilestones_20220925_v01

   If files are retrieved by date, name them with the date appearing first:

   - e.g. 20200923_CorporateArchivesReferenceLog
   - e.g. 20211013_DailyReceipts

3. Avoid vague files names such as Miscellaneous, Various, or Archives.

4. Do not use staff names to identify files, e.g. BobsReport.

5. Avoid initials, abbreviations and codes that are not commonly understood. Long term the meaning behind them may be lost or obscured.

6. Use ISO date structure so files sort properly – YYYYMMDD.

Drafts and Versions

1. Files must be sorted into an appropriate folder. Avoid an accumulation of orphan files.
2. Indicate different words in a single element using capital letters, e.g. AnnualReport.
3. Separate elements using an underscore, e.g. AnnualReport_CorporateArchives.
4. Do not use any other special characters (@, $, %, \, etc.) aside from an underscore.

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General Tips

Agree on naming for drafts and versions.

1. Drafts
    - Do not use "Draft" at the start of the file name, always place last.
    - If not using a collaborate platform such as MS Teams to make changes to drafts, indicate edits using initials of staff members making them.
    - e.g. AnnualReport_CorporateArchives_20210927draft_rt

2. Final documents and versions
    - Once finalized, consider adding "Final" at the end of the file name.
    - Final documents can also be converted to PDF to prevent unintentional edits after finalization.
    - Documents that may produce future versions should be labelled using v01, v02, etc. at the end of the file name. Make sure to use a "0" in the version number to make sure the files sort properly.

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