

Guidelines for File Naming Conventions

A file naming convention is a framework for naming your files in a way that describes what they contain and how they relate to other files. Useful file names are consistent, meaningful to you and your coworkers, and allow you to find files easily.

The following are some guidelines on establishing file naming conventions within your office or department.

Determine what information is needed to easily locate a specific file.

Developing a file naming convention is done by identifying the key metadata elements in your files. These elements could include things like the date of creation, the author's name, frequency of creation, a project name, the name of a section or subsection of a project, the version of the file, etc. The file name should be descriptive and provide just enough contextual information for identification and retrieval.

Determine the order for the metadata elements in your file names.

Think about how you want to sort and search for your files in order to determine the order of the metadata elements in the file name. The computer arranges files by name, character by character. Therefore, put the most important information first. If you anticipate wanting to find a file by date, then put the date first. If you anticipate wanting to find the file by author, put the author's last name first (*more on this below*).

Your files will be grouped together based on the first few components, so elements should be ordered from general to specific detail of importance as much as possible.

Example: FY2024_Budget_Lib_20240112_V02.xls

Keep it short, but meaningful.

Try not to make file names too long. Operating systems have different limits to the number of characters you can have in a file path. As a general rule, aim for a 40-50 character limit in your file name. This means you will need to find the right balance of elements in your file naming convention. Too few elements create ambiguity, but too many can limit discovery and create unnecessarily long file paths.

Use meaningful abbreviations and acronyms where appropriate. Abbreviating helps create concise file names that are easier to read and recognize. However, take care to use abbreviations that are consistent and understood by everyone. The goal is to ensure that file names are clear enough for other individuals to find in a future search.

Deliberately separate metadata elements within the file name and avoid spaces and special characters.

Determine the characters you will use to separate each piece of metadata in the file name.

The preferred options for delimiting words within an element are to use Camel case or hyphens.

- Camel case (the first letter of each word within an element is capitalized): FileName.xls
- Hyphens: file-name.xls

The preferred option for delimiting elements is the underscore (_).

Many computer systems cannot handle spaces in file names, so do not use spaces.

Avoid special characters such as: ~ ! @ # \$ % ^ & * () ` ; : < > ? . , [] { } ' " | since different operating systems have different characters that they do not recognize in file names. Even if your own operating system allows you to save the file you may encounter difficulties if you try to transport the file to another operating system.

Use a standard date format.

Agree on a logical use of dates so that they display chronologically. A good format for date designations is the ISO 8601 format YYYYMMDD or YYYY-MM-DD.

Standardize personal names within file names.

It may be appropriate to include the name of an individual within a file name, usually when the record is created by or is about that individual. Personal names within a file name should have the last name first followed by the first name or first initials.

Examples: JonesElizabeth_transcript_20240112_V02.pdf ;
JonesEM_transcript_20240112_V02.pdf

Avoid using only a person's first name to name a file.

Avoid common or meaningless terms in file names.

Avoid using common words such as "draft" or "letter" at the start of file names, or all of those records will appear together in the file directory, making it more difficult to retrieve the records you are looking for.

Avoid using terms like "general," "other," or "miscellaneous" in file (or folder) names since they don't provide any information that will aid in identification and retrieval.

Use leading zeroes to preserve sequential order when sorting.

When using a sequential numbering system, use leading zeroes to make sure files sort in sequential order. For numbers 0-9, always use a minimum of two digits to ensure correct numerical order (e.g., 01, 02, 03 etc.). In your file naming convention, specify the number of digits that will be used in numbering so that files are listed numerically (e.g., 01 or 001).

Use version elements if you are maintaining different versions of the same file.

This information is less relevant if you are creating documents using applications that have version control built in (e.g., Google Docs). However, some documents go through a number of versions; for example, they start out as working drafts, become consultation drafts, and finish

with a final draft, which may then be reviewed and updated at a later date. It is important to be able to differentiate between these various drafts by using a version numbering system.

An element for version control should start with “V” followed by the version number (e.g., V01, V02). As noted above, the version number should include a minimum of 2 digits with a leading zero to ensure that search results are properly sorted. The version control element should go at the end of the file name.

Example: FY2024_Budget_Lib_20240112_V02.xls

You can adapt the version numbering system to indicate major and minor revisions to the document. Any major changes to a file can be indicated by whole numbers; for example, V01 would be the first version, V02 the second version. Minor changes can be indicated by increasing the decimal figure after an underscore () or hyphen (-); for example, V01_01 or V01-01 indicates a minor change has been made to the first version and V03_01 or V03-01 indicates a minor change has been made to the third version.

When revising policies and procedures, make sure you are retaining an unaltered copy of the superseded policy or procedure.

Create logical folder structures to organize your files.

Organize files into a logical folder structure. Create a hierarchy that reflects the relationships between different types of files, projects, or departments. This helps users navigate the file system easily and helps create the contextual information necessary to identify and retrieve files.

Name folders in a consistent manner.

Apply the same principles of clarity and consistency to folder names as you would to file names. Ensure that folder names are descriptive and follow a standardized format.

Document your decisions.

Record your file naming conventions so that others in your department (or in the College Archives) can follow the standard. Creating a README file for your department and keeping it with your top-level folders is a good option.

A file naming convention breaks down if not consistently followed. Be sure that everyone who needs to use the file naming convention is aware of it and knows how to apply it.

If your department has chosen a standard vocabulary for file names so that everyone uses a common language, record that information.

If you are using acronyms and abbreviations in your file names that are not easily understood outside your department, record that information.

Not perfect, but better.

Robust file naming conventions are a valuable tool for users to identify and retrieve files, especially if they are moved or shared. There are no file naming conventions that are perfect. No file naming convention will include all of the contextual information necessary for every user to identify and retrieve every file they search for. However, they will substantially increase users' chances of finding what they need.