Electronic File Naming Conventions

There are a number of conventions that should be adopted when titling files and folders on shared drives and other locations. The purpose of providing these rules is to give you some best practices for naming electronic files and also to try to standardise the way in which this is done to assist their retrieval and retention.

Contents

1. Avoid repetition and redundancy
Keep titles short but meaningful.

- Long file names mean long file paths, which are more difficult to remember and transmit
- There are limits to the number of characters allowed in file paths
- There is often no need to duplicate words in the file title which appear in the folder title
- Words like "the", "a" and "and" usually do not contribute towards the meaning but add length
- Words such as "folder", "spreadsheet", "word document" and "presentation" are not necessary as it is obvious from the format/type and/or extension what the file is

Example	
Correct	*Incorrect*
Chicken Egg Committee remit.docx	The chicken and egg committee remit.doc
Investment perf 2012.ppt	Presentation to the Council about 2012 investment performance.ppt
HESA return 2017 - Law.xlsx	Spreadsheet 2017.xlsx

2. Format of dates
State dates 'back-to-front'.

- Always use four-digit years, two-digit months and two-digit days: YYYY-MM-DD or YYYY-MM or YYYY or YYYY-YYYY
- Using dates in this fashion means that the chronological order is maintained when the file names are listed in the file directory, which helps in retrieving the latest record

Example	
Correct	*Incorrect*
📄 2018-07-26 Agenda.docx	📄 26 Jul 2018 Agenda.docx
📄 2018-07-26 Induction report.docx	📄 Induction report for 26 07 18.docx
📄 2018-11-09 Welcome.pptx	📄 Welcome to QMUL presentation.pptx
📁 2019-10-07	📁 7 October 2019
📁 2019-05	📁 December 2019
📁 2019-09	📁 May 2019
📁 2019-12	📁 September 2019
(ordered alphanumerically as they would appear in the directory list)	(ordered alphanumerically as they would appear in the directory list)

3. Avoid use of non-alphanumeric characters

Operating systems have different requirements and there are certain characters they do not recognise in file names.

- Avoid: * : | \ / < > ¦ " ? [ ] ; = + £ $, . &
- However, hyphens (-), underscores (_) (including for web pages and documents uploaded to a website) and round brackets may be used,

Example	
Correct	*Incorrect*
📊 2016-2017 Budget.xlsx	📊 Budget 16/17.xlsx
📄 Role profile - Assistant registrar.rtf	📄 "Assistant registrar role prof".rtf
For web pages: 🌐 contact-details.html	For web pages: 🌐 Key Contacts page.html

4. Personal names

Give the family name first followed by any initials or forename.

- It will be easier to retrieve records relating to individuals if the family name is used first
- Do NOT name files after yourself or other staff members' names; instead use job titles or role

Example	
Correct	*Incorrect*
📁 SMITH Lucy	📁 Lucy Smith
📄 Brown SR 2018-01-15.doc	📄 Sam letter 15 Jan.doc
📁 Institute Manager	📁 Paul's files

IT Delivery Manager - monthly report to Institute Manager 2017-11.doc	Yussuf's Report to David November.doc

5. Numbers must have two digits
Use a leading zero.

- Unless it is a year or another number with more than two digits, a leading zero should be included for numbers 0-9. This will maintain the numeric order of files to help retrieve the latest record which should always appear at the bottom of the list

Example	
Correct	*Incorrect*
Guide chapter 01.pdf Guide chapter 02.pdf Guide chapter 03.pdf … Guide chapter 10.pdf (ordered alphanumerically as they would appear in the directory list)	Guide chapter 1.pdf Guide chapter 10.pdf Guide chapter 11.pdf Guide chapter 2.pdf Guide chapter 3.pdf (ordered alphanumerically as they would appear in the directory list)

6. Version control
The version number of a file should be included in its name by a 'v' followed by the number.

- Use the first decimal point for final versions or major updates and the second decimal point for drafts and minor updates. It might be helpful to include this in a document's footer as well

| Example	
Correct	*Incorrect*
Complaints procedures v00.2 - draft.docx Complaints procedures v01.0 - final.docx Complaints procedures v03.2 - final.docx … Complaints procedures v10.1 - draft.docx (ordered alphanumerically as they would appear in the directory list)	Complaints procedures - revised.docx Draft_complaints_procedure.docx Draft_strategic_plan.pdf Old Complaints procedures.docx Updated proc 2015-16.rtf (ordered alphanumerically as they would appear in the directory list)

7. Recurring and infrequent events
Name using the date first for recurring events or using description first for one-off events.

- Meeting documents, monthly reports etc. should be named with the date first as they are time specific. Refer to rule 2

Example	
Correct	*Incorrect*
/…/Website/ 2016-03-12 Site stats.docx 2016-03-19 Site stats.docx 2016-12-16 Agenda.doc 2016-12-16 Minutes.doc	/…/Website/ Stats 12032016.docx Stats 19032016.doc

- Files for events which are infrequent, but regularly recurring, or one-off should be named with the event description/title first

Example	
Correct	*Incorrect*
Council reception 2011-10-23.rtf Annual finance award 2013.docx	October reception for Council.rtf 2013-08-02 finance award.docx

8. Naming of correspondence
Include as much information as possible.

- Where possible the file names of correspondence should include the name of the correspondent, an indication of the subject, the date of the correspondence and whether it is incoming or outgoing (except where this is incompatible with rule 1)

Example	
Correct	*Incorrect*
Jones W-Appeal 2013-07-12.msg Jones W-Appeal 2013-08-20.msg Jones W-Appeal 2013-09-08 rcvd.msg	W Jones 12Jul13.msg William Jones 20Aug 13.msg William Jones 8 Sep.msg