

Records Management Tip Sheet

Naming Conventions

How do I name digital files and folders?

Questions?

416.585.4562

archives@vicu.utoronto.ca

http://library.vicu.utoronto.ca/archives/records_management



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Do This!

✓ **Do include dates**

⇒ Acceptable date formats:

YYYYMMDD

YYYYMM

YYYY

YYYY-YYYY

✓ Do these examples:

...20190918Agenda.docx

...Appeals 2017-2018.xlsx

...Requisitions\2005\...

✓ **Do keep titles short and meaningful**

⇒ If a file or folder name is too long you may lose access.

✓ Do this example:

...20171102Minutesv03.doc

× Avoid this example:

...The Nov2 Meeting Minutes-Final-Updated.docx

✓ **Do use version control**

⇒ Acceptable formats:
v00, v01, v12

✓ Do this example:

...OrgChart2018v06.pdf

✓ **Do embed the path and file title into the record**

✓ See the bottom of this Tip Sheet for an example.

✓ **Do order elements for easy access**

✓ Date first is appropriate for records documenting frequent recurring, date specific activities (minutes, agendas).

✓ Activity, type, or other title element first is appropriate for records documenting infrequent or non-date specific activities (awards ceremony, exhibitions, advertisements).

Avoid This!

× **Avoid repetition**

between file and folder titles

× Avoid these examples:

...Committee**Meetings**\20001015**Meeting**Agenda.docx

...Orientation **2010**\Presentation**2010**.pptx

× **Avoid acronyms and initials**

⇒ You can use commonly understood acronyms (USA, UofT, HR)

× Avoid this example:

...**Bld**\19991010 **Mtg**.pdf

× **Avoid special characters:**

* : \ / < > | " ? [] ; = + & \$, .

× Avoid these examples:

...Policy**&**Procedure.pdf

...Committee 2017+18\Meetings\...

× **Avoid descriptive terms** for status, format, or version:
Draft, Final, Edits, Updates, Revised

× Avoid these examples:

...**Final** Annual Report 2014.docx

...Budget2016**DraftRevised**.xlsx

...**Updated** Budget 2020.pdf



Files and folders should follow **consistent** naming standards.