Document Naming Conventions

What are they?
Naming conventions are standard rules applied to electronic documents and folders. Naming documents consistently, logically and in a predictable way distinguishes them from one another at a glance and facilitates their storage and retrieval.

Formats
- **Dates:** Dates are often not required since they are captured by metadata. When a date is necessary (e.g. meeting minutes and agendas) use a hyphen to separate the year, month and day, e.g. YYYY-MM-DD.
- **Names:** Write the name of a person, if required, using surname, followed by initials, e.g. SmithB_Consultation.
- **Numbers:** Use two digit numbers when using a number in a document title to keep the documents in numerical order, e.g. 01, 02, 03.
- **Versions:** Some documents go through a number of stages. Where applicable, it is important to differentiate between these, e.g. 2016_ECM_Minutes_draft, 2016_ECM_Minutes_final.
- **Metadata:** Use metadata in document properties instead of the document name, e.g. creator, date created, date modified, title.

Best Practices
- Avoid the use of symbols, e.g. ~ " # % & * : < > ? / \ { | }. Hyphens and underscores are permitted.
- Use hyphens or underscores to separate words (not spaces), e.g. Naming-standards.html. When converting or migrating files, spaces in filenames create extra characters. Avoiding spaces will help keep filenames shorter.
- Avoid repetition and redundant words in folder and file names.
- Avoid using acronyms or abbreviations.
- Do not use words that are excluded from searches, e.g. the, if, but, so, for, etc.
- Keep document names short, but meaningful.
- Ensure the document name accurately describes the content of the document.

Benefits
- Creates uniformity in naming electronic documents.
- Enables accurate retrieval.
- Decreases the amount of time spent finding information.
- Eliminates storing duplicate items, especially duplicate items with different names.
- Ensures files are easily distinguished from one another.

Supporting Documentation
- [IMT Standard A000042 – Data Exchange Standard – Date, Time, and Date and Time](https://alberta.ca/enterprise-information-management.aspx)
- [IMT Standard A000059 – Metadata – Core Content](https://alberta.ca/enterprise-information-management.aspx)