Electronic Document Naming Convention Advice

When determining the naming conventions to be used for documents saved into electronic files stored within TRIM/Records Online (ROL), the principles outlined below can prove to be extremely useful.

Do

- Be descriptive and concise.
- Be consistent whatever conventions you use for naming your documents.
- Do consult with your users how the documents will be searched and retrieved later on.
- Do indicate version numbers, draft and final if the documents require version control.

Don't

- Do not use any punctuation symbols character such as: \ / < > | " ? [ ] ; = + & $ in the title.
- Do not use abbreviations without also spelling out the abbreviated words. The meaning of abbreviations can change or be forgotten over time, and as such, it is always better to spell out a set of abbreviated words as well as including the abbreviation.

Tips

1. Once a naming convention has been decided, please take the following into consideration:

   - Will I retrieve or report these documents in one go later on?
   - What are the search criteria/strings I would use if I were to look for these documents later on? i.e. surname, subject, date, document types, etc.
   - What are the most important key elements I need to include in the document title? i.e. key terms that will most likely be searched for should be in higher order than the rest.
   - How I would like my documents be sorted later on?

2. Use YYYYMMDD as the date format in document titling, as it will sort your documents in a strict date order.

3. Document names of correspondence should include the following components:

   - Name of correspondent.
   - Subject description, where it is not given in the folder title.
   - Date of letter/email/memo using the date format YYYYMMDD.

When considering the order of the naming components, consider:

- How will these documents be sorted or reported in future?
- Will you be looking for correspondence in date order or by the name of the correspondent?

Most importantly, once you have decided the order, stick to it and be consistent.

If you require any additional assistance, please do not hesitate to contact Records Management Services:

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