

## **Naming Conventions for Electronic Documents**

### **Records Management Project 2015**

#### ***Definition of Naming Convention***

A means by which one can create understandable, consistent file names for documents

#### ***The need for a Naming Convention for documents***

A naming convention allows timely, accurate and reliable access to information, thereby meeting the business needs of the University. It avoids doubt when choosing between different documents stored in your workspace. Accidental deletion of relevant documents is avoided. Sorting of documents is facilitated, enabling related documents to be grouped together. It also allows, perhaps most importantly, one to interpret file contents without reference to its creator.

#### **SharePoint**

Items on SharePoint are accessible via URLs which need to be as short as possible; some operating systems and software cannot cope with extremely long URLs. This is particularly important as URLs are built up of domain name/site name/folder name/file name, which means the URL is already quite long before you even add a document. The file name only takes a small proportion of the whole URL.

Example:

<https://hub.bcu.ac.uk/sites/cict/cs/city-south/Shared%20Documents/SharePoint/SPNamingConventions.docx>

domain name	sites and sub sites	list name	folder name	document name
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#### ***Principles of the Naming Convention***

- **Use of alpha and numeric characters only**

Use letters (A to Z, a to z) and numbers (0 to 9) only; this makes the file names familiar and easier to remember

- **Unique file names**

Giving the same name to more than one document in the same folder could lead to the inadvertent deletion of another document in that folder

- **Clarity and conciseness of file names**

File names should only use enough information to clearly describe the document's contents

Avoid abbreviations, acronyms, codes, etc, that are not commonly understood

Following the two rules above, be as expressive of the contents as possible

If names are excessively long, SharePoint may not be able to handle them properly. But if you want to describe the content or purpose of a document in detail you can use the SharePoint Title field: in MS Office go to *File* tab, then *Info*; in SharePoint go to *Edit Properties* on the *Documents* tab

- **Prohibition of certain characters**

The following should not be used within file names as they will cause issues:

- Spaces
- Full stops [.] Note: the file name extension automatically provides a full stop
- Non-text characters such as: &!#\$%&^'~+;=\\:\*/'<>|

- **Retain the document name**

Once a name has been given to a document that name should not change throughout its entire life cycle. This ensures that any link to the document remains the same throughout its life.

In SharePoint, version numbers simply are not required any more:

- SharePoint will automatically save new versions and backup previous versions for you as long as the *Document Version History* feature has been switched on

Example: *SharePoint Naming Conventions v2.1.docx* should not be used

Instead, use these variations instead:

*SP-Naming-Conventions.docx* or

*SPNamingConventions.docx*

- It is unnecessary to include dates within file names and doing so may tempt you to rename files when you amend the document. The date created and last modified is already automatically stored in the document information: in MS Office documents go to *File tab, Info*; in SharePoint it is recorded in *Properties and Version History*

- **Demarcation of individual words with capital letters**

Adds clarity to the title

- **Avoidance of repetition and redundancy**

This increases the length of file names

File names need not usually include the title of the parent folder in which the document will be filed, as this detail will be available in a directory display

File names should not include terms such as PDF, Presentation, Spreadsheet etc; the type of file will be obvious from the file icon and the file extension

Information such as the name of the document's creator and date of creation will be captured as metadata by the application used

- **Expression of dates “back to front”**

Dates should follow the BS ISO 8601:2004 basic format:

- YYYY Year
- YYYYMM Year and month
- YYYYMMDD Year, month and day

A range of years should be expressed as YYYY-YYYY (i.e. using the hyphen)

The above approach ensures that the files remain in chronological order in a List view, and that the most recent document will be at the end of the list

The date given will be a significant date relevant to the document, not the system-generated date that the system automatically assigns when the document is created, or updates every time a document is saved

- **Universal use of two-digit numbers**

Use a leading 0 for all numbers 0 to 9

- **Student files: Family Name expressed first**

Use the Family Name as given by the student records system and use this consistently thereafter

- **Student ID expressed after Family Name**

Use the Family Name, followed immediately by the Student ID, once allocated

e.g. Homer88206210 not HomerSD

Prior to allocation of the ID Number, use Family Name, followed immediately by Given Names, using, if possible, the Application, or email from the prospective student as the authority

Note: a separate document will be prepared giving rules on forms of names (e.g. compound surnames, names in various languages etc)