

INTRODUCTION

A need for consistent naming practices for electronic content items, specifically documents in directories, has been identified. Establishing naming conventions that are used consistently across an organization or an organizational unit will improve access to information in documents stored in an electronic work environment and in electronic information management applications. Although there are many methods to electronically search for documents, users still tend to browse through directory structures looking for the documents they require.

Implementing good document names can support the following objectives:

- Facilitate better access to and retrieval of electronic documents.
- Allow sorting of documents in logical sequence (e.g. version #, date).
- Help users to identify the items they are looking for easily and support the ability to recognize the content of a document from a list.
- Help keep track of versions of documents.

The naming practices included in this guide apply to electronic documents created in a desktop environment and stored in shared or common directory structures. They are meant to assist departments and school sites to develop coherent and consistent approaches for naming their electronic documents.

ELECTRONIC WORKSPACES

Directory and Folder (Collection) Structure

Directory and folder (collection) names by their nature will contain information that defines the document content. For example, a folder marked Accounts Payable means that the documents contained in the folder need not contain the words accounts or accounting. Simply the name of the account or vendor may be sufficient.

Accordingly, when there are multiple levels of folders (collections), the names of each of these folders (collections) need to be taken into account when deciding which file naming elements are required and whether or not to establish abbreviations for naming elements.

Several points to remember:

Location. Relying on the folder (collection) structure is only useful as long as the document continues to reside in the same folder. Should a document need to be moved or reclassified, it may need to be renamed.

Name Length. In standard desktop applications, the entire path and file name are treated as the name of an item.

Web Documents. If a document is to be posted on a web site, the version for posting may need a different name than the draft or other versions.

ELEMENTS OF DOCUMENT NAMES

Document names should contain enough information to properly describe the contents of the document. However, keeping titles short will help users to quickly identify and retrieve accurate information. The following suggestions aim to strike a balance between creating usable, meaningful titles and brevity.

When determining the elements to be used and the order of the elements, it is critical to determine how the users will be retrieving the documents and design the naming convention appropriately. It may also be necessary to differentiate the structure and order of name elements from one directory to the other. The naming structure of documents in different folders (collections) needs to be based on user retrieval requirements.

For example, a “Meetings” file, may need to have the date of the meeting as the first element, thus ensuring all material related to one meeting date are sorted together. For example:

Student Services\ Staff Meetings-SS\ **2005-01-04 Agenda-SS**
 Student Services\ Staff Meetings-SS\ **2005-01-04 Agenda Background.-SS**
 Student Services\ Staff Meetings-SS\ **2005-01-04 Agenda Minutes & Decisions-SS**
 Student Services\ Staff Meetings-SS\ **2005-02-04 Agenda Agenda-SS**
 Student Services\ Staff Meetings-SS\ **2005-02-04 Agenda Minutes & Decisions-SS**


 
 
 Collection Collection within collection File name

Versions are treated by using the Version update functionality in DocuShare. The current version is displayed, with access to previous versions in the “History” area of the “Properties” for the document.

File Name Elements	Example	Description
Date	2006-01-01	
Title	Enrolment Calculation Sheet	These elements are usually needed to facilitate searching for the document and the display of like documents in a logical order
School	BES	Helps to identify a school’s document

USING NAMING CONVENTION ELEMENTS

Table 1
Use of Naming Convention Elements

Element	Text	Explanation
Date	2005-02-28	<p>This is a significant date relevant to the document (e.g. version or published date). It is not the system-generated date that the software automatically updates each time a document is saved.</p> <p>Use the metric (international) date standard YYYY MM DD to facilitate the sorting and display of files in a logical order (see Alberta Data Standard).</p> <p>Use of the date should be defined by business needs, e.g. what is the most useful date for retrieval purposes. It may well be simply the year, e.g. for recurring repeats.</p>
Title	Free Form	<p>Think of the user/recipient and how they might search for and retrieve the document. Use a title that clearly describes the content of the document. The name should be intuitive to those who need to access it but not excessively long. Use standard abbreviations that have been agreed on by the organization and/or business unit. When creating multiple versions, use the same title for all versions.</p> <p>Consider if the sorting order is significant e.g. title first? date first?</p>
Type	AGD CON DFT FRM LTR MIN MTG PLN RPT SUM	<p>Document type can help reduce the length of the title. Where this information is captured as a metadata element, it is not likely to be needed in the document name.</p> <p>Do not include document type if its location (folder) identifies the type.</p> <p>The following type codes are examples. It is best to keep this list to ten or less.</p> <p>Agenda Contract Draft Form Letter Minutes Meeting Plan Report Summary</p>

Abbreviations

Consistently used abbreviations can keep the name length manageable. If, however, abbreviations are not standardized, they can be very difficult to interpret after the passage of time.

APPENDIX 1: EXAMPLES

Example #1:

Using the full naming convention, this document would be named as follows:

DATE – Title – School/Dept

E.G. 2005-08-31 Document Naming Conventions – Procedure-CS

The extension can be eliminated by editing the name and deleting the extension (such as .doc, .pdf).

Example #2:

In the following example, the full convention is used, except that the document type (AGD for agenda) is included in the title and is therefore not a separate item in the document name.

2005-02-03- Staff Meeting AGD-CS

Date – Title - School/Dept

Example #3:

In some cases, the folder structure can carry some of the burden of the document name. For example, a business area has a project folder to which only certain people have access privileges. Inside that folder there is another folder for meetings and inside that is a folder for minutes. All drafts and accepted versions of minutes of each meeting are kept here. The folder structure would be “Project Name\Meetings\Minutes.”

In this case, the naming convention may consist of:

- Date - Meeting
- 2005-02-15 - Staff Meeting -CS
- 2005-03-15 - Staff Meeting -CS

In this case, the folder structure (e.g. Project Name\Meetings\Minutes) carries a significant amount of information. The title of the document is the meeting date. However, should the document be moved to another folder, the context would be lost.