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**DOCUMENT NAMING CONVENTION – QUICK TIPS**

Our organization manages information (in all formats – paper and electronic) in an efficient and effective manner. We classify, protect, retrieve, store, preserve and dispose of information according to (insert governance guidance document).

**NAMING CONVENTIONS**

The consistent use of a file naming convention makes electronic files easier to find and limits the number of subfolders needed. Naming conventions are standard rules applied to electronic documents. They allow for documents to be filed consistently, logically, and in a predictable way. It is very effective when a work unit consistently follows the same naming convention.

**INTERNATIONAL DATE STANDARD**

When a date in necessary (e.g. meeting minutes and agendas, identifying one report from another), use a hyphen to separate the year, month, and day such as YYYYMMDD. Adding a date is an effective way to identify the meeting date for minutes of a meeting as the date the file was saved may differ.

**SUBJECTS**

All files should be described with a clearsubject that adequately describes what the file includes. Subjectsshould be consistent across all versions of a document. When files are stored in an electronic system, such as a shared drive, it is unnecessary to repeat words for the file classification in the file name. Case files, those files for a person, student, project or organization should be consistently named for ease of access.

**DRAFT / FINAL / REFERENCE**

Wherever applicable, files should be marked with “Draft, Final, or Signed” when applicable

* + Draft when a document is a draft.
  + Final when finalized and no further edits required and now declared the official record. Final documents are often saved as PDFs to ensure file integrity
  + Signed or Executed is often used to identify the signed version of a document that has a blue ink signature

**HYPHENS vs SPACES**

Use spaces to separate words, not hyphens, to keep file names shorter.

**DOCUMENT NAMING CONVENTION – QUICK TIPS**

**VERSIONS**

Version numbers (versA, versB, versC) allow for tracking the development of a document and identifying earlier versions. Small decimal increments indicate minor revisions and whole numbers represent major revisions. Apply “read only” each time a new version is created.

**NUMBERS AND SYMBOLS**

Use two digit numbers when using a number in a document title to keep the documents in numerical order; e.g., 01, 02, 03. Avoid the use of symbols; e.g., #, &, ?, %, {, etc.

**ACRONYMS**

Avoid the use of acronyms unless commonly known to the entire team

**Examples of filenames to be used by our team**

* + 1. nnual Report 2016-17 draft versA
    2. 017-04-27 Annual Report 2016-17 draft versB