

1. Introduction

Multiple documents are created by university employees on a daily basis. Properly naming documents provides consistency in document organization, quick retrieval when searching and can greatly reduce duplication of work.

The following best practice is intended to serve as a general guideline and to provide examples of proper naming convention.

2. Short but clear

Document names need to be kept as short as clarity and usability permits. Keep in mind that clarity is never served by the use of initials, non-standard abbreviations, codes or obscure acronyms that most users will not understand.

Some words will add length to a document name without contributing towards its meaning. Avoid the use of verbs, adverbs, adjectives and empty words (the, a , an, my, mine, and, or, etc).

Avoid repetition and redundancy in document names as they increase the length of the file path. A document name should not therefore contain information that is already present in the folder in which it is filed.

RIGHT



• / ../council/minutes 2020-09-19.doc

WRONG



• / ../Council/Council Minutes 2020-09-19.doc

3. Order the elements

The elements to be included in a document name should be ordered according to the way in which the document will be retrieved during the course of the day to day business, how this is implemented will invariably depend of the way you work.

For example, if a document is usually retrieved according to its date, then the date element should appear first. If, on the other hand, the document is retrieved according to its description, then the description element should be listed first.

- /../unit meeting /2020-06-30 Agenda
- /../unit meeting/2020-06-30 Minutes
- /../unit meeting/2021-01-20 Agenda
- /../unit meeting/2021-01-20 Minutes
- /../Events/Garden Party 2020-06-30
- /../Events/Retirement Party 2020-09-05
- /../Events/Winter Festival 2019-01-23

The first example shows minutes and agendas of a unit meeting. The agendas and minutes of a meeting are likely to be retrieved on the basis of the date of the meeting, hence it is best to have the date at the start of the file name. If not, then all of the agendas will come at the top of the list, followed by all of the minutes, etc.

The second example shows the document names of the documents in the Events folder. Events are likely to be retrieved by the name of the event rather than the date of the event, hence more useful to have that element first.

4. Names

People's Names should be written as Last name First initials.

Example: {
• Smith J

5. Correspondence

Correspondence should be written with the name of the correspondent, and indication of the subject, the date of the correspondence, and whether it is incoming or outgoing.

Example: {
• Smith J appeal 2021-09-19 incoming
• Smith J appeal 2021-09-25 outgoing

6. Email attachments

Email attachments should include the name of the correspondent, an indication of the subject, the date of correspondence, incoming or outgoing, and "ATTCH".

Example: {
• Smith J appeal 2021-09-19 outgoing ATTCH

7. Teaching sessions

Teaching sessions should be in the format YYYY-MM.

Example: {
• course schedule 2020-01
• course schedule 2020-05
• course schedule 2020-09

8. Programs, courses and syllabus

Document names for programs, courses and syllabus should use the official course code and faculty abbreviations.

Example program
and course:

- HIS-2802, MSI-1001

Example syllabus:

- SYLL ADM 1101 SUMMER 2006

9. Version and status

The version and/or status of the document should be added at the end of the name by adding “V” followed by the two digit of the number of the version, and, if applicable, the status of the files (draft, final, accepted, refused).

RIGHT

- /.../IM Policy V01
- /.../IM Policy V02
- /.../IM Policy V03
- ...
- /.../IM Policy V10
- /.../IM Policy V11 Final

WRONG

- /.../IM Policy V1
- /.../IM Policy V10
- /.../IM Policy V11 final
- /.../IM Policy V2
- /.../IM Policy V3
- ...

10. Upper case vs lowercase

Use all lower-case letters, with spaces between to differentiate between words, not underscores, or hyphens.

Upper case letters can be used for proper names, as well as abbreviations/acronyms.

11. Spaces and separators

Only use hyphens to separate elements of a date.

Avoid using hyphen, underscores or any other characters to separate elements of a name, since this will limit your search results.

12. Numbers

Use a “0” in front of all numbers from 1 to 9 in order to ensure their numeric sort. Two zeros “00” are used if the numbers are expected to exceed 99 and three zeros “000” if they are expected to exceed 999.

13. Dates

When using the date as part of a document’s name, use the YYYY-MM-DD date format.

In general, dates should be at the end of the name, but can be placed at the beginning to facilitate ordering in chronological order. This can be useful for minutes, agendas, etc.

14. Commonly used abbreviations and acronyms

The following is a short list of some of the commonly used abbreviations¹.

Full word	Abbreviation
Administrative	ADMIN
Agenda	AGD
Account payable	AP
Appointment	APPT
Architecture	Arch
Building	BUILD
Certificate	CERTIF
Committee	COMM
Contract	CON
Department	DEPT
Directive	DIR
Expense	EXP
Finance	FIN
Form	FRM
Fiscal Year	FY
Frequently Asked Question	FAQ
Identification	ID
International	INTERNAT

¹ For more commonly used abbreviations, please consult: <https://public.oed.com/how-to-use-the-oed/abbreviations/>

Inventory	INV
Letter	LETR
Minutes	MIN
Miscellaneous	MISC
Meeting	MTG
Number	NO
Organization	ORG
Plan	PLN
Purchase order	PO
Policy	POL
Project	PRJ
Report	RPT
Statistics	STATS
Standard Operational Procedures	SOP
Work Order	WO
Year end	YE
January	JA
February	FE
March	MR
April	AL
May	MA
June	JN
July	JL
August	AU
September	SE
October	OC
November	NO
December	DE