# File naming conventions.

Naming conventions are standard rules that are applied to records in order to ensure records are name in a consistent meaningful way. Without naming conventions your records have no context and the content of the record is meaningless to anyone but the creator, and are at risk of being lost or accidentally deleted. By naming your records in a consistent manner creators and users of records can:

* Group interrelated records in the same folder
* Distinguish between similar records
* Easily locate and retrieve the record in future
* Identify the content of the record from the same
* Apply a standard that is understood by everybody in the team

# Guidelines for naming your files.

1. Use concise but meaningful names.
2. Ensure the file names are meaningful to the team.
3. Avoid generic i.e. meeting notes, or ambiguous names that could lead to confusion and misidentification of the records.
4. Ensure that the file name accurately reflects the content or purpose of the file.
5. Be consistent in how you name records to promote ease of understanding. For example, your entire Directorate should use the same format for dates, such as YYYY-MM-DD. Only use abbreviations if they are understood by the entire team.
6. If you need to include personal data in a file name i.e. casefiles consider who can access these files. To ensure personal data cannot be extrapolated from such files by staff who shouldn’t have access to them, consider access controls such as storing such files in a separate section of the network drive. If you need a separate network drive contact the IS team [File Management (sgul.ac.uk)](https://www.sgul.ac.uk/about/our-professional-services/information-services/it-services/itav-support/file-management)
7. Document and communicate your conventions to ensure that they are adopted across the team.
8. As new types of records emerge, or your team evolves review and update your naming conventions as appropriate.
9. Abbreviations should only be used if they are commonly understood by everyone.
10. Do not name records or storage folders after an individual as no-one else will know what they contain and if the person leaves the records could be lost as people may believe the folder contains personal information.

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| **Convention** | **Description** |
| Give records meaningful names. Names should be meaningful and where possible avoid initials and abbreviations not understood by the team using the records. | If a file name will remain meaningful you can remove words such as ‘and’ or ‘the’. You can use abbreviations that are understood by all can be used i.e. DOB for date of birth.  Avoid using the name word twice and unnecessarily increasing the length of the file name. |
| Spaces in files can cause an error when transferring files or loading a file. | Consider using RAECCommittee rather than RAEC Committee. |
| Version control. When there is a requirement to display file names in alphanumeric order remember to include a zero for numbers 0-9. | RAECCommitteeMinuesV01  RAECCommitteeMinuesV02  RAECCommitteeMinuesV03 |
| If using a date in a file name i.e. DDMMYYYY the date should be back to front i.e. YYYYMMDD. | 20210715RACECommittee |
| If you need to name an individual in a file name either use the student number or surname followed by given name. | 2400659  2400659SmithJoan  SmithJoan |

# References

1. [Essential Records Management](https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&ved=2ahUKEwjo-eLjtL3_AhXBQ0EAHeliAl0QFnoECB0QAQ&url=https%3A%2F%2Fcdn.nationalarchives.gov.uk%2Fdocuments%2Fessential-records-management.pdf&usg=AOvVaw0OWULmF557FBgelzTeFnLp) (A guide to managing electronic records using existing infrastructures and resources) The National Archives
2. Managing Records: a handbook of principles and practice Elizabeth Shepherd and Geoffrey Yeo 2003