

What is the purpose of this guidance?

This tip sheet describes the guidelines for how to name electronic document and files.

Why is this important?

This is important because it provides consistency across the agency. It is also an important step in the processes of electronic records management and the beginning stages of future investments such as an Enterprise Content Management (ECM) system.

What is not covered by this guidance?

This guidance does not explain how to organize the documents and files in a taxonomy.

Still have questions?

Contact [Records and Information Management \(RIM\) \(Internal Link\)](#).

What is a Naming Convention?

Naming conventions are guidelines for naming electronic documents, files, directories, folders, etc. The rules provide structure for consistency across the agency, office to office, program to program, person to person.

Rules...

- Rule 1 Make file names meaningful, accurate, and short
- Rule 2 Delineate words in the elements of file names
- Rule 3 Use dates in the standard format
- Rule 4 Use approved abbreviations and acronyms
- Rule 5 Order the elements in names by their importance
- Rule 6 Use numbers in the standard format
- Rule 7 Omit non-alphanumeric characters in file names
- Rule 8 Avoid repetitions of words from folder names
- Rule 9 Avoid use of a person's name

Rule 1 Make file names meaningful, accurate, and short

- Long file names are more difficult to recognize and to share as URLs.
- Make sure documents can be identified on their own without the folder they are saved in or opening the document.
- Characters are limited in folder and document names (and will be required in WSDOT's future taxonomy scheme.)
- Remove words that add length, but do not contribute towards the meaning. For example, words like "the", "a", "and".

Rule 2 Delineate words in the elements of file names

- Use capital letters and dashes (hyphens) as preferred methods to separate words and naming elements.
- Underscores may be used but are not a preferred method.
- Spaces should not be used because it counts as a character.

Rule 3 Use dates in the standard format

- Enter dates “back to front” in the file directory. This helps when trying to retrieve the latest dated record.
- Examples:
 - YYYY Year (4 digit number) example: 2015
 - YYYYMM Month (2 digit number) example: 201502
 - YYYYMMDD Day (2 digit number) example: 20150214
- Hyphens should not be used in dates since they only add characters that are not necessary.
Note: In applications such as SharePoint, lists may be displayed in ascending or descending order which facilitates search and retrieval.

Rule 4 Use approved abbreviations and acronyms

- Use only approved or standardized initials, abbreviations and codes.
- Abbreviations and acronyms should be capitalized as well as first letter of the following word.
- Agency records and information management program manages all approved abbreviations and acronyms for use in the taxonomy, file plan, folder and file naming.

Rule 5 Order the elements in names by their importance

- Enter elements in the name in the order according to the way in which the record will be retrieved.
 - For example, if the date is the most important element, it should come first in the name.
 - If the location/site is the most important element, then the site number should come first in the name.
- Once a document type/record has a standard naming convention, then this naming should be used continually to assist facilitate ongoing retrieval.

Rule 6 Use numbers in the standard format

- When using numbers in a file name, always use a two-digit number, unless it is a year or another number with more than two digits.
- The practice of including the zero in numbers 0-9 will maintain the numeric order when file names include numbers.
- Examples:
 - Correct: Procedures01, Procedures02, etc.
 - Incorrect: Procedures1, Procedures2, etc.

Rule 7 Omit non-alphanumeric characters in file names

- The use of these special characters can cause problems.
- Even when the operating system allows a save of a file with special characters, it may cause difficulties in moving to another system or retrieval later.
- It is recommended to eliminate use of non-alphanumeric characters in folder and file names including * \ < > | “ [] ; = + & % \$, .
 - Note: Hyphens can be used in place of forward slashes and brackets.
 - For example, using an “&” in a SharePoint name is not accepted in this application.

Rule 8 Avoid repetitions of words from folder names

- Avoid repetition of word in file paths and file names. It should read almost like a sentence.
- Unnecessary repetition increases length of the file names and uses up characters.
- Generally if the word is in the folder name, then it is not repeated in the file name.

Rule 9 Avoid use of a person's name

- Do not use a person's name in a folder or file to identify the owner or creator (such as the employee's name.)
- When it is appropriate to include a personal name, it should be last name first followed by initials without punctuation to facilitate retrieval. An example may be correspondence to a person.
- There is no need to use the person's title.
- Additional guidance on using a person's name for a location name is covered in programs' policies and procedures.

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