



Best Practices for File Naming

The Importance of File Naming

We've all had the experience of trying to find a file that we've saved but can't remember what we've named it or had to open multiple other files with similar names to find what we are looking for. These experiences highlight the importance of filing naming for managing e-records.

Establishing a file naming convention based on best practices is a key part of managing e-records throughout their lifecycle. A consistent naming convention helps organize e-records during active record use, allows for better management and maintenance while the records are inactive prior to disposition, and provides more efficient access to e-records for public records requests and legal needs.

File naming conventions can be applied to files and folders and work hand-in-hand with file organization conventions. Unit practices regarding organization and file naming for electronic records should be well documented, enabling employees to locate and manage records in compliance with state and federal legal requirements.

Your Responsibilities for Records Management

Folder names should describe the contents. File names should be distinctive enough to exist independently of the original folder location because records are occasionally moved or copied to other folders.

When creating a naming convention, consider ways to consistently incorporate division or program names, document types (agenda, speech, minutes), and/or geographic location into file names. Avoid using vague terms like "Misc" or "doc1".

Do not allow applications or systems to "auto-save" a filename, as they are unlikely to be helpful over time.

Dates

If dates are part of the file name, use the following format: `yyyymmdd`. This practice maintains records in chronological order, making it easier to dispose of records according to retention schedules. Place the date at the beginning of the file name for documents representing events that are date-specific or recurring and at the end of the file name for records that are more likely to be located by title than the event date, such as a policy or procedure.



Keep It Short

File names should be short, descriptive, and easy to understand for people unfamiliar with the contents. They should make sense over time—not just to people currently working with the records.

The length of the file name is important. Overly long file names, combined with long file paths, can later render the file unavailable and make the record difficult to manage throughout its lifecycle.

Versioning

While it is common to use “draft” as part of the file name, it is not helpful in distinguishing one version from another. For documents that have multiple drafts, include the version number in the file name.

Use “Final” in the file name to indicate the final version of the document, where quickly identifying the record is important.

Avoid Special Characters, Emojis, and Spaces

Avoid using special characters such as: ~ ! @ # \$ % ^ & * () ` ; < > ? , [] { } ' "). A period should be used only between the file name and the extension. Hyphens and underscores can be used.

Some systems now allow you to use emojis in file names. Do not use emojis in file names, as this can affect long-term preservation of files.

Do not use spaces in folder or file names. If a space is needed, use an underscore, hyphen, or CamelCase.

Use Sequential Numbering

Sequential numbering allows multiple objects with the same name to sort correctly in a folder, helping locate records quickly. This becomes particularly critical for folders containing large numbers of records, such as mass digitization projects that may have the same name but are distinguished by the number. For example, ScanProject_01.pdf, ScanProject_02.pdf ScanProject_03.pdf..)

When using numbers in the title, use two or more digits (e.g., use 01 instead of 1).

When unsure how many leading digits to use, determine how many related files might be created with the same file name. For every 100 files, add a leading zero (e.g., if you create 1000 files, the numbering scheme should start with 0001).



File Naming Examples

Below are some examples of file naming best practices for records that are created and maintained by a unit. These are not comprehensive but are meant to serve as guides. Units may develop and document their own conventions using these best practices based on their business needs.

- **Release Date:** PolicyName_Released_yyyymmdd
- **Publication Date:** PublicationTitle_Published_yyyymmdd
- **Version Number:** PolicyName_v1_20210401
- **Creator:** Appraisal_BuckyBadger_20210523
- **Content:** 20210704_SpeechLaCrosse
- **Intended Audience:** 20210901_PublicNewsRelease
- **Project Name or Number:** SharedDriveCleanup_Workflow_20210831
- **Department Name:** FarmManagement_PolicyReport_20210603

Where Can I Get Help or Additional Training?

You can ask questions and get additional help by contacting the [Records Management Program](#). We also have additional training on records management topics on our [website](#).