



# Records Management Guide: Document Naming Conventions

## Document Naming Conventions

This document provides a common set of rules to apply to the naming of files or electronic documents. A file naming convention is a systematic method for naming files that will make them easier to retrieve later. Naming conventions are descriptive and provide a logical and predictable way to manage and retrieve records across your agency. Records organized in a consistent way allow you to:

- Know the content of a file without opening it
- Find and identify files even if they are no longer in their original folder
- Easily browse long lists of files
- Manage files more easily, even when they're all stored in one central folder or directory

Please note that the information in this guide provides a basic introduction to file naming conventions. A specific file-naming convention that will work for your organization should be developed using this guidance as a starting point. This naming convention is applicable wherever electronic documents are stored.

File Naming Best Practice	Example File Name	Explanation
<b>Keep file names short but meaningful.</b>	RALSAAnnualReport122020.docx	<p>Words, like 'the' and 'and' add length to a file name but do not contribute towards the meaning. If the file name is meaningful within the context of the file directory, these elements can be removed.</p> <p>Where words have standard acronyms for example 'RALS' for 'Records and Licensing Services', these can be used in the file name.</p> <p>Note: File names are limited to 256 characters in SharePoint and 254 characters in Content Manager</p>





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<p><b>Use capital letters or hyphens to delineate words.</b></p>	<p><b>Example 1:*</b> AttendancePolicy.pdf ClosingInstructions.pdf</p> <p><b>Example 2:**</b> Attendance-Policy.pdf Closing-Instructions.pdf</p>	<p>*Using spaces to delineate between words is not recommended especially when using web based platforms like SharePoint. Removing the space or underscore reduces the length of the file name, and by using capital letters to differentiate between the words the file name is still recognizable.</p> <p>**Hyphens may also be used to separate words and can be useful when performing partial title searches applications like Content Manager. Content Manager would treat the file names in example one as a single word but would treat the file names and separate words.</p> <p>In other words, if you searched for 'policy' and the file title were 'AttendancePolicy', the search would not return the results you were seeking. The file in example 2, however; would come up.</p>
<p><b>Avoid using non-alphanumeric characters in file names.</b></p>	<p>AttendancePolicy.pdf Budget2019-2020.docx</p>	<p>Different operating systems have different file name requirements, in particular different characters that they do not recognize in file names. In most cases, the operating system will reject these characters and not allow the file to be saved.</p> <p>Even if your operating system allows you to save the file, you may encounter difficulties if you try to transport the file to another operating system. The file may not be recognized, or if you send it to someone else, they may not be able to open it.</p> <p>Avoid: * : \ / &lt; &gt;   " ? [ ] ; = + &amp; \$ , .</p> <p>However, hyphens (-) may be used.</p>





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<b>Avoid unnecessary repetition and redundancy in file name and file paths</b>	<p><b>Example 1:</b> /.../Court/20041030Minutes.docx</p> <p><b>Example 2:</b> /.../Procedures/Appeals.docx</p>	<p>When using OneDrive and SharePoint, the total character limit (folder and document titles combined) should be no more than 400 characters. Using a flat folder structure and avoiding redundancy will ensure these limits are not exceeded.</p> <p>In the first example the folder is called 'Court', so you don't need to include the word 'Court.'</p> <p>In the second example, the folder is called Procedures, so it is not necessary to include the word 'Procedures' in the file name.</p>
<b>Write dates back to front</b>	<p>20190324Agenda.docx 20190324Minutes.docx 20200201Agenda.docx</p>	<p>Example shows the minutes and agendas of committee. By stating the date back to front the minutes and agendas from the most recent meeting appear at the bottom of the directory list.</p>
<b>Order the elements in a file name in the most appropriate way to retrieve the record</b>	<p><b>Example 1:</b> 20210630Agenda.docx 20210630Minutes.docx 20050120Agenda.docx 20050120Minutes.docx 20050201Agenda.docx 20050201Minutes.docx</p> <p><b>Examples 2:</b> CutePetContest2022.docx FileCleanupParty2022docx</p>	<p>When deciding the order of the elements, consider whether the record is a product of a reoccurring event or routine functions. Date first will usually be appropriate for events that are time specific and recurring (such as meeting minutes and agendas, weekly, monthly or annual reports, etc. should include both the date and the event name or description.</p> <p>Description first file names will usually be appropriate for records that relate to infrequent or one-time tasks or events.</p> <p>The first example shows monthly meeting minutes and agendas. Minutes, agendas and handouts of a meeting are likely to be retrieved on the basis of the date of the meeting. It is therefore best to have the date at the start of the file</p>





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		<p>name, otherwise all the agendas will come at the top of the directory list, followed by all of the handouts, and then by the minutes.</p> <p>The second example shows the file names of the files in the Events folder. Because events are likely to be retrieved by the name of the event rather than the date of the event, it is most useful to have that element first.</p>
<p><b>The version number of a record should be indicated in its file name by the inclusion of 'V' followed by the version number</b></p>	<p><b>Example 1:</b>            OrgChart2020V02.pdf            OrgChart2020V03.pdf            OrgChart2020V04.pdf</p> <p><b>Examples 2:</b>            BudgetReport2020-2021V03Draft.docx            BudgetReport2020-2021V04Final.docx</p>	<p>Some records go through a number of versions, and it is important to be able to differentiate between these various drafts by giving them each their own number.</p> <p>Where a version number is applicable, it should always appear in the file name of the record so that the most recent version can be easily identified and retrieved.</p> <p>In some cases, it may also be applicable to indicate if the record is a draft or a final record as shown in example 2.</p>
<p><b>Avoid using common words, such as draft or letter at the start of file names</b></p>	<p>AdvertisingV01Draft.docx            AdvertisingV05Final.docx            BudgetReport2019-2020V20Draft.docx            BudgetReport2019-2020V20Final.docx</p>	<p>File directory lists files in alphanumeric order. This means all records starting with file names Draft will be listed together.</p> <p>When retrieving files, it will be more useful to find a draft record next to the previous version rather than next to an unrelated draft record.</p>





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### Other Considerations: Additional Metadata Fields

In addition to naming conventions, there are other tools that will aid in the organization and retrieval of records. Some additional metadata fields are automatically generated by the program used to create them. This can be very helpful as it offers additional ways to sort, organize and search for records.

Below is an example of metadata fields in Microsoft Word. The fields outlined in yellow are automatically created. This includes created and last modified dates, author and size. There are also fields that individual users can populate themselves. Outlined in green are record title, tags and comments. You may choose to use these fields to add key words, categorize the document based on function or add other information you feel is relevant to the record.

Deciding on which elements to add to metadata fields is entirely up to you and your organization but as mentioned above, they should be logical and aid in retrieving the record when needed.

The screenshot shows the 'Info' pane in Microsoft Word. On the left is a navigation menu with options: Open, Info, Save a Copy, Save as Adobe PDF, Print, Share, Export, Close, Account, and Options. The main area contains several document management tools: Protect Document, Inspect Document, Version History, and Manage Document. On the right, the 'Properties' section is expanded and highlighted in yellow. It contains the following information:

Properties	
Size	108KB
Pages	1
Words	80
Total Editing Time	305 Minutes
Title	File Naming Conventions
Tags	naming convention; guide
Comments	Add comments
Related Dates	
Last Modified	Today, 7:21 PM
Created	Today, 2:16 PM
Last Printed	
Related People	
Author	JR James, Rochelle
	Add an author
Last Modified By	JR James, Rochelle

Related Resource: [Content Manager \(CM\) Title Guidelines for Folders and Boxes](#)



King County Records Management Program  
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[www.kingcounty.gov/recordsmanagement](http://www.kingcounty.gov/recordsmanagement)

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