



Naming Conventions

How to Name Documents and Files

Naming conventions are standard rules applied to digital documents and files. Consistent, predictable names will help you identify, retrieve, and manage your documents and files over time.

Note: Titles are a key requirement in the BC Government **Metadata Standard** <undergoing approval>. Digital file and document names often include several metadata elements, such as titles, dates and classifications. Your naming conventions need to reflect the systems and practices in your ministry or program area.

Recommended Key Elements

- **Name:** should accurately reflect content and be easily understood
- **Date:** use the IM/IT Date and Time Standard YYYY-MM-DD

- **Versions & Status:** help users find the right file or document with terms such as:
 - Version 0.1 (for a draft), 2.0 (final)
 - CURRENT or DRAFT
 - SUPERSEDED or CLOSED
 - FINAL or APPROVED
- **Author/Creator:** if needed, provide the ministry/division/branch name or acronym or Surname, First initial (e.g. CITZ; Lai, M)

Best Practices

1. Maintain a list of standard terms, codes, abbreviations, and acronyms, and standard data elements order
2. Capture what the document is about (e.g. minutes, report, chart, committee name)
3. Keep names meaningful but short
4. Use consistent terms, punctuation, and spelling
5. Ensure any acronyms are spelled out in the document or in metadata
6. Use leading zeros to keep files in numerical order (e.g. 003, 030, 300)

Examples of Best Practices

- CITZ UFO Admission Committee
- UFO Minutes 2018-02-01
- UFO Registration Procedure v.02 DRAFT

Options

- Spaces, hyphens, dashes, or underscores between words
- Standard acronyms, and codes
- Codes (may be automatically generated)

Avoid

- Personal names: personal identifiers, use a code or initials instead if possible
- Repetition and redundant words
- Words excluded from searches (e.g. the, if, but, so)
- EDRMS users: turn off Smart Characters in Outlook if using special characters (e.g. & " #)
- Changing the file extension

Benefits of Naming Conventions

- Ensures consistency
- Enables accurate retrieval
- Allows sorting by version, date, etc.
- Speeds up searches
- Helps manage versions of documents

Other Resources

[ARCS and ORCS User Guide](#)

Metadata Guide <when approved>

[UBC Document Naming Conventions \(5 min video\)](#)

Additional Information

Contact your [Records Officer](#) and check out the other [RM Guides](#).