

Record Naming Conventions

UFV Records Management Guide

Naming conventions are standard labels applied to records that follow a consistent and logical sequence. Naming conventions contain elements that allow the user to describe content within a record in order to support information retrieval.

How will naming conventions help me as an employee?

Record naming conventions are key to maintaining well-organized electronic drive structures. Naming conventions ensure records are easily distinguished one from another, records are easy to browse, and less time is spent on finding information. Naming conventions support document version control and information retrieval for all users.

Naming conventions can help employees properly apply UFV's records retention schedule (under development) by efficiently managing the storage and retrieval of records and information. Although this guide refers specifically to electronic files, similar procedures and conventions should be adopted for the classification of paper files to ensure consistency in identifying records in all formats.

How can I seek support in adopting this new protocol?

The first step in adopting record naming conventions is making time to clean up transitory records. Transitory records can clog shared record keeping systems and make it difficult to identify and label valuable information. Start by continuously vetting records for transitory status using UFV's transitory record schedule and destroy them as necessary. Records of administrative, operational, historical, or legal value become easier to categorize and can be labeled using a record naming convention system agreed upon by the department. Make time to attach a naming convention to records that are saved to a shared drive.

For support on determining the value of a record or using this guide, [contact UFV's records manager.](#)

What are the elements of a record name?

All records are to be named consistently with a method that is documented, shared, and in accordance with this protocol. The purpose of record naming conventions is to standardize search, retrieval, and organization of records. Naming conventions are a UFV RIM requirement and considered a best practice.

If your office has a system that is working well, continue to use it under UFV's record naming protocol. What is important is that your department's system is communicated to all staff members and applied consistently.

Describe Your Content

A naming convention is comprised of elements that when combined form the record name. The name should also appear in the footer information of all electronic documents.

Key naming elements include:

- Account number (if applicable)
- Subject/activity (required)
- Document type (required)
- Version status (if applicable)
- In some cases, other elements of a record may need to be included, such as file size (photos) or date (if it does not appear in the shared directory) formatted YYYYMMDD. This is applicable only if it provides context to the value of the record.
- Use camel case (RecordsManagement) or underscores (Records_Management) to separate content within the name

Document Type

Use the abbreviations below to identify document type. If you require a new abbreviation, please email us to add it to the template.

A	
Academic Planning & Priorities Committee	APPC
Account	Acct
Adjustment	Adjs
Agenda	Agn
Agreement	Agrmt
Announcement	Anncmnt
Appendix	Appndx
Approved	Appd
Appointment	Appt
Award	Awd
B	
Biography	Bio
Board Governance Committee	BGC
Board of Governors	Brd
Budget	Bdgt
C	
Chair	Chr
Change	Chng
Chart	Chrt
Committee	Cmte
Communication	Cmn
Contract	Cntrct
Correspondence	Crrsp
Council	Cncl
Criteria	Crtra
D	
Dean	Dn
Decision	Dcsn
Definitions	Dfn
Discussion	Dsc

Distribution List	DstrLst
Draft	Drft
Directory	Dir
E	
Election	Elctn
Evaluation	Eval
Executive Committee	ExcCmte
Example	Exmp
Expense	Exp
Expression of Interest	EOI
F	
Faculty	Fclty
Faculty Excellence Award	FEA
Faculty Service Excellence Award	FSEA
Faculty Standards Committee	FSC
Finance & Audit Committee	FAC
Flow Chart	FlwChrt
Form	Frm
Frequently Asked Questions	FAQ
G	
Guide	Gd
Guidelines	Gdl
Graduate Studies Committee	GSC
Grant	Grnt
I	
In-Camera	IC
Index	Ind
Indigenization Committee of Senate	ICS
Information	Info
Interview	Intvw
Invoice	Inv
J	
Job Description	JD
L	
Legal document	Lgl
Letter	Ltr

List	Lst
M	
Manual	Mnl
Meeting	Mtg
Member or Membership	Mbr
Memo	Memo
Minutes	Min
N	
Notice	Ntc
Newsletter	Nwsltr
O	
Orientation	Ornt
P	
Package	Pkg
Page	Pg
Paid	Pd
Paper	Ppr
Payment	Pymt
Permit	Prmt
Photo	Pht
Plan	Pln
Policy	Plcy
President	Pres
Procedure	Prcd
Process	Prcs
Proposal	Propsl
Poster	Pstr
Presentation	Prs
Provost	Prv
Purpose	Purp
R	
Remuneration	Rmn
Report	Rpt
Research Excellence Award	REA
Resolution	Rsltn
Results	Rslt
Review	Rvw

Record and Information Management	RIM
Receipt	Rcpt
S	
Sample	Smp
Schedule	Sched
Secretary	Sec
Secretariat	Scrt
Selection Committee	SlctCmte
Senate	Sen
Senate Awards & Honours Committee	SAHC
Senate Budget Committee	SBC
Senate Governance Committee	SGC
Senate Committee for Student Appeals	SCSA
Senate Research Committee	SRC
Senate Teaching & Learning Committee	STLC
Service	Srv
Service Agreement	SrvAgrmt
Signature	Sig
Signed	Sgd
Software	Sfw
Special Purpose	SplPurp
Special	Spl
Speech	Spch
Staff	Stf
Standing Committee	StdCmte
Survey	Srvy
Summary	Sum
Supplement	Sppt
T	
Teaching Excellence Award	TEA
Terms of Reference	TOR
Timeline	Tml
Tools	Tls
Transfer	Trnsf
U	
Undergraduate Education Committee	UEC
University	Univ
University Secretary	UnivSec

V	
Vacancy	Vcy
Vice Provost	VcPrv
Video Conference	VC
Voting List	Vtg Lst
W	
Website	Wbs
Working	Wrkg

Be Consistent

Using the naming elements, names can be adapted to fit the content of your record. The key is to be consistent across all record types that are grouped together. Departments that share access to records should collectively determine names that are consistent between all users/unit staff. Units must ensure that the records under their care are secure and both authentic and reliable. Electronic records should be stored on one consistent system (i.e shared drive). Multiple documents stored on shared drives, or in systems such as MS Teams, cloud servers, SharePoint, can become unruly quickly. Without a naming convention it is difficult for users to determine the version status and whether the record has been acted upon. **All records should be named consistently with a method for naming that is documented, shared, and agreed upon by the unit(s).** In some cases, departments may want to create a “dictionary” of shared naming language to ensure all employees are consistent.

Use UFV's guide to common abbreviations and acronyms to identify the document name. If you require a new abbreviation, [please e-mail us](#) and we will add it to the template.

Ordering Elements

The names of records relating to recurring activities should include both the date and the subject name or description, so that the record can be identified and retrieved. When deciding the order of naming elements, consider that date first will usually be appropriate for activities that are time specific and recurring. Activity or subject first will usually be appropriate for records that are infrequent, but regularly recurring. The elements to be included in a file name should be ordered according to the way in which the record will be retrieved during the course of everyday

business. This will depend on the way you work. Often, it is not necessary to include the date in the record name if the date that appears in the shared drive will suffice.

Version Control

Once the final version is documented as the official record, previous versions can be vetted for transitory status and destroyed appropriately. The naming convention should always be annotated as to the status of the record by adding the version element (Final, V01, V02, etc.). For finalized documents, it is best to save the document as a PDF so that no changes can be made to the final version. Common best practices for version control include:

- Using *DRAFT* as a watermark instead of as part of the file name
- Maintain the naming conventions throughout the versioning process
- Only major revisions need to be labeled
- When using editor's initials to keep track of revisions from multiple people, add the editor's initials instead of changing the version number.

Recap

- Keep names concise, reference-based upon the document content.
- Avoid unnecessary repetition and redundancy in names.
- Separate the elements of a document using underscores or camel case. Be consistent.
- When including a number in a name, always label it as a two-digit number by starting with a 0 when the document is final (i.e. 01-99, unless it is a year).
- If using a date in the name, always state the date 'back to front' and use the ISO standard: YYYYMMDD (e.g. *HRCommunicationPlan20150522.pdf*).
- When including a personal name in a record name, provide the surname first followed by the initials. Avoid naming records after the record owner or creator. Do not divulge personal information in the filename (e.g. *Smith.RDisciplinaryLetter.pdf*).
- Order the elements in a name in the most appropriate way to retrieve the record. If records are retrieved according to their subject matter, that element should appear

first. If the records are retrieved according to a numerical identifier, that element should appear first (e.g. *AdministrativeProjectPlanV03.pdf*, *KIN111CourseOutline20200104.xls*).

- The names of records relating to recurring events (e.g. meeting minutes and papers, weekly, monthly or annual reports, event management, and budget planning documents) should include the event name/description to appropriately reflect the subject matter (e.g. *20201216Bi-MonthlyBoardMeetingAgenda.doc*, *BudgetPlanQ04_20201228.xls*).
- Naming conventions do not usually contain dates as the shared drive (storage medium) provides heading/column information that automatically indicates the last date the record was opened/accessed/modified. Dates can be used if the record needs to be retrieved or classified by a date.
- Avoid descriptive terms regarding format or version (e.g. draft, memo) at the start of file names and stop words that are excluded from searches (e.g. the, and, for).
- Use acronyms and abbreviations only if they are widely understood and unlikely to change in the future. In some cases, departments who share records with others within a unit may want to develop a standardized “dictionary” to ensure all employees are using language and naming that is consistent (i.e. Photo vs picture, planning vs development).

Examples

Example 1: The document name identifies the record as a photograph with elements of the event/subject, size if applicable to the content of the record, and version.

Subject/Activity	Document Type	Date
College of Arts Convocation	Photos	20190607

Record name: 20190607CollegeArtsConvocation.jpg

Example 2: The document filename identifies the record as a records management project with various related documents with multiple versions. Older versions become transitory if they do not hold business value to the University.

Subject/Activity	Document Type	Version (V)	Employee Revision Label
RIM Project	Q4 Report	Final	
RIM Project	Q4 Report	V01	JM

Record name: RIMProject_Q4Report.pdf or RIMProject_Q4Report_V01JM.doc

Example 3: The document name identifies the record as a photograph with elements of the event/subject and the size of the record as it relates to version control.

Subject/Activity/Account Number	Document Type	Version (V)	Date	Size
Smith. B Headshot	Photos	Final	20190607	300px

Record name: SmithBHeadshotPhotos20190607_300px.jpg

Example 4: The document name identifies the record as a Board of Governors agenda package.

Subject/Activity	Document Type	Version (V)	Date
Board of Governors	Agenda Package	Final	20190422

Record name: 20190422BoardGovernorsAgendaPackage.pdf

Example 5: The document filename identifies the record as a Dean's report.

Subject/Activity	Document Type	Version (V)	Date
Health Sciences Dean	Report	V02	20190426
Health Sciences Dean	Report	Final	20190501

Record name: 20190501_HealthSciencesDean_Report.pdf or
20190426_HealthSciencesDean_Report_V02.doc

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