

File Naming Tips for Electronic Records

- Each file name should be unique and not reliant on the current location of the file.
- The only special characters used, if any, should be the dash and/or the underscore.
- No spaces should be included in the file name (use dashes or underscores instead).
- Use the 3 character file extension with a period (e.g. .tif not .tiff) at the end of the name.
- Minimize the number of characters (check into the maximum your system can handle and generally 25 characters is the maximum...shorter is even better for later transfer to another system).
- Don't rely on the system being able to differentiate between upper and lower case and be consistent in what is used.
- If you include digits in the file name, include the appropriate amount of leading zeros and be generous so your project can be scalable.
- It's helpful to include metadata in the file name but this can be cumbersome if you have huge numbers of files. That said, consider using shortened versions of 1) a standardized date, 2) version number (only if this can/will vary), 3) creator's name, and 4) description/type of document/subject in the file name and in a logical order.
- Use an easily understood (to staff members entering the name and to the end user) format. Simpler is usually better.
- Document whatever naming convention you settle on. This really is the key. Include the naming convention document any time records are transferred elsewhere.