



NAMING CONVENTIONS

Guidelines for Files and Folders

INTRODUCTION

Most digital records and information repositories that the United Nations uses, including SharePoint Online, usually feature good search engines to retrieve files. It is important nevertheless that folders, documents and records be named in a consistent and logical manner, so they can be located as quickly and easily as possible.

GENERAL PRINCIPLES FOR NAMING FILES AND FOLDERS

- ❖ **Give a unique name to each document.**
- ❖ **Give a meaningful name** which closely reflects the record contents.
- ❖ **Express elements of the name in a structured and predictable order.**
- ❖ **Keep file and folder names as short as possible.** This is especially true for documents stored in SharePoint Online, as the file names appear into their URLs. A long file name will generate a long SharePoint file path, making it more complicated for email sharing. Also, data excess can slow down the performance of the system.
- ❖ Elements of the filename should be **ordered according to their level of detail**: from the general to the more specific.
- ❖ **Avoid unnecessary repetition.**

FILES NAMING CONVENTIONS

When creating documents and records in Office 365 One Drive or SharePoint, metadata are automatically created (e.g. author; date created; document; version number), hereby giving valuable contextual information about the file. It is nevertheless useful to note that it is best practice to establish conventions for naming files. In Office 365, using naming convention for files is akin to a unique identifier for the file and it also prevents files overwrite. These are the guidelines:

- Document title–Date-Version number.
- The recommended date format is YYYYMMDD (e.g. 2019 12 31).
- Do not use special characters (e.g. * : < > ? / \ |)
- Version indicators help to keep track of the development of a file. The format recommended is to use the ordinal number (1, 2, 3, etc.) for major version changes and decimal numbers (e.g. 0.1, 0.2) for minor changes. All drafts should have version numbers less than 1.0 (e.g. 0.4).
- Use capital letters to delimit words, not spaces or underscores. In SharePoint, space in between words is interpreted as “%20” which is not user-friendly and readable. HR Portal in a URL will be displayed as HR%20Portal. Use “HRPortal” instead)
- Using personal names: this is usually used in filing correspondence. Use surname first, and then initial.



- Avoid using “draft” or “letter” at the start of names. There may be several documents in draft in a folder and it will be easier to locate the right document if it is filed by its title.

Document types and suggested abbreviations (3-4 letters max):

Type	Abbreviation
Action Plan	Act
Agenda	Ag
Audit	Aud
Briefing	Brf
Plan	Pln
Policy	Pol
Presentation	Pres
Procedure	Proc
Project	Proj
Reference	Ref
Report	Rep
Strategy	Str
Terms of Reference	TOR
Note	Not
Minutes	Min
memorandum	Memo
Letter	Ltr

FOLDERS NAMING CONVENTIONS

Naming principles are also applied to folders. The ways in which this can be done include:

- Use standard terms for the functions and activities of the Organization
- Use a clear explanation of what a folder contains
- In a SharePoint library or folder, always use the “Camel case” which means that in a word, the first letter should be capitalised.
- Do not use people’s names for directories’ names (job titles or roles are acceptable).