Operational Guidance

Naming Conventions

Parent policy:	Records Management Policy
Date approved:	13 July 2026
Approved by:	Associate Director for Information Compliance
Date of next review:	June 2028
Review frequency:	2 years
Role responsible for review:	Associate Director for Information Compliance

1. Overview and Purpose

This guidance is optional; it is intended to communicate best practice approaches to creating digital files in a standard format to ease navigation.

Good naming practices help everyone as clear file names support efficient search and reduce duplication. Consistent naming of folder and files also help colleagues understand your work and avoid version confusion.

Poor naming can accidentally reveal confidential information, cause records to be misplaced, or hinder retention and disposal processes.

2. Scope

This guidance can be applied to any digital files created by the University.

3. Definitions

For definitions of Information Compliance terms please see our Term Glossary

4. Roles and Responsibilities

The Associate Director for Information Compliance is responsible for ensuring best practice for naming conventions is documented and made available to UEA staff. They are responsible for he content of this document and ensuring it is reviewed.

5. Practical Guidance

Naming Principles

When naming a file or folder, ensure it is:

a. Clear - someone unfamiliar with the work should still understand what it is.

b. Consistent - follow the same pattern every time.

c. Concise - name should not exceed 60 characters wherever possible

d. Minimalist with personal data - only include personal identifiers when necessary.

e. Readable - avoid special characters such as / \ : . ? " < > | # % & { }

Designing Consistency

It is important to be consistent with how files are named as this determines how they are presented within a folder or document library.

Choosing what elements to include and in what order should be your starting point.

Element	Meaning	Examples
Date	When a file was created or applies to	2026-01-28 20260128 1316
Subject	The project, cohort, module code, student ID (if necessary), supplier, etc.	MTH101 UG2026 Project ABC123
Descriptor	What the item actually is	Minutes Report Contract Guidance
Version	The particular form of an item separate from any earlier iteration or instance.	v1.1 v2.0

Date

The date should be constructed from the largest to smallest units of time: year, month, day. The format should always be YYYY-MM-DD with zeroes where applicable (i.e. 1992-08-01 for 1st August 1992).

If there is a lot of traffic within a day, it may also be useful to include hours and minutes (i.e. 20260713 1516).

Using a date in this format, at the start of an item's name, ensures that they are stored in chronological order – this increases the likelihood of finding it quickly at a later date.

Some people prefer to use hyphens (-) within the date (i.e. 1992-08-21). So long as a department is consistent it does not matter if the naming convention uses hyphens or not.

Version Numbers

It is sometimes useful to include a version number in the name of a file – particularly, for draft or superseded documents.

For live published documents – such as policies – the version number should not be included in the name. This is to ensure that any existing links pointed at the document are likely to find its replacement. Instead, the version number (and dates of review) should be included with a 'Revision History' or 'Document Control' section within the file itself.

You should never use words to indicate versions. Do not use phrases such as:

- x final
- x most recent
- x new
- x latest
- x use this one

6. Quality, Compliance, and Best Practices

This guidance is optional. There are no quality assurance or compliance measures in relation to the content of this document.

7. Related Documents

Records Management Policy

Records Management Guidance Pages (MyUEA)

8. Revision History

Version number	Approval date	Approval mechanism	Details of change
1.0	13/07/2026	AD approval	Initial version.