How Do I Name a File? Video Transcript

Slide 1: Records Management at Duke

Welcome! The Records Management Program at Duke University provides guidance to university offices and departments on managing their physical and electronic records.

Slide 2: For More Information

For more information on the records management program, please visit our website at the address below.

Slide 3: How Do I Name a File?

Employees of Duke University create electronic files every day. In fact, we create so many files that they can be difficult to manage and organize. One great way to help organize these electronic files is to use a standard file naming convention.

Slide 4: Create a File Naming Convention

Every file you create should have a distinct file name. This will help both you and other staff members at Duke locate the correct file. If you call every file Document 1, it will be difficult to identify the file you want.

Slide 5: Parts of a File Naming Convention

Most file naming conventions consist of three parts: a Description or Topic that best describes the file; a date of creation or editing for the file; and some form of Version Control.

Slide 6: Parts of a File Naming Convention

When you put all three parts together, you end up with a distinct file name, such as MeetingMinutes2-15-2020Final or AcceptanceLetterMarch2020Draft.

Slide 7: Parts of a File Naming Convention

The order of the three parts can be changed depending on your office needs or workflows. For example, if you work with financial documents, it may be easier for you find files if the transaction date is listed before the topic.

Whatever order you choose for your file naming convention, be consistent! Consistency will ensure it is easy to find the files you are looking for.

Slide 8: Tip

Quick Tip: File names can get lengthy, so remove extra spaces whenever possible. Use hyphens, underscores, or capital letters to indicate different words in your file name.

Slide 9: Questions or Concerns?

Thank you for joining us today. Do you have any questions or concerns? Please contact the Records Manager at hillary.gatlin@duke.edu.