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Policy on Naming Conventions and Metadata

Purpose: The purpose of this policy is to establish naming standards for digital records in order to facilitate the maintenance, identification, transfer and management, security, and preservation of electronic records.

Policy: To enable the management and retrieval of electronic records, agencies must develop file and folder naming conventions for all records in a record series. **Every record must have a unique name that is consistent, descriptive, and logical.** The name should be understandable within an agency or business unit.

At a minimum the following information about a record must be available from the record's filename and embedded metadata:

- creation date;
- subject;
- document or file type; and
- version or revision date.

Depending on the program used to create the record, some of the required information may be automatically embedded as metadata and do not need to be replicated in the file name.

Further Guidance on Naming Records and Folders:

- Folder and subfolders names should be unique and follow the agency's file plan.
- Use names that describe the contents and that are understandable to all members of the unit or agency.
 - WRONG: "Draft letter to Comptroller"
 - CORRECT: "Letter to Comptroller re Storage fees for OEM records"
- Use only standard acronyms (e.g. NYC, OEM, DORIS).
- Separate fields with a hyphen ("-").
- Do not use run-on subjects names (e.g. "storagefeesforOEMrecordsv2").
- Use ISO date format (YYYY-MM-DD) when manually creating date fields.
- Put the naming elements in the order that would be used to retrieve the record, either date or subject.
- In file names, use only the characters A-Z (upper and lower case), the numbers 0-9, underscores (" _"), and hyphens ("-"). DO NOT use any other symbols.
- For compatibility reasons, the combined length of the complete file path and file name (e.g. "\\Server1\Users\UserName\ProjectFolder\File Name.ext") should not exceed 260 characters.