ELECTRONIC FILE NAME STANDARD

Part of the Highways Agency Information Management Policy

Purpose: To explain the Agency policy for providing a file name when using **SAVE** or **SAVE AS** commands in a Windows application. A quick guide is available. See Guidance Note Electronic File Name Standard Quick Guide.

INTRODUCTION

This guidance note details how the Agency expects all staff to create a file name when saving documents.

It improves business efficiency by bringing related items together under a common label and distinguishes similar items where successive versions exist.
This allows information to be shared with colleagues, made accessible and understandable in an open working environment and assist in meeting Freedom of Information and Data Protection Act requirements.

STANDARDS

- **The previous format for showing versions within files names was to use a decimal point to separate the major and minor version changes e.g. v1.1. However, this is now changed due to false virus alerts that can occur if a file appears to have two or more file extensions**

  - **e.g. Annualreport_staffinglist2004_v1.0.doc.**

  This is a ruse that many virus writers use, therefore Highways Agency anti virus software is set to stop these files within e-mail attachments and send them into a quarantine area within a recipients Outlook folder. The new format is to use an underscore in place of a decimal point.

  - **e.g. Annualreport_staffinglist2004_v1_0.doc.**

  The British Standard recommends version control using a decimal point between major and minor changes and most staff within the Highways Agency use this format. Using a decimal point in version control will still continue in all text other than filenames.

- **File names should be descriptive, but also kept to a minimum in length. The maximum number of characters that should be used in a file name, which includes the full file location, is 200 characters. Underscores should be used instead of spaces within a folder or file name. If a file path and name exceeds an application limit, which varies with each product, the file will be inaccessible.**

When creating a file name keep in mind:

- Brevity: keeping file names short
- Usability: usefully describing the content
- Clarity: must be meaningful to others
- Specificity: using very precise terms; and

- Collocation: grouping under broad headings that will assist effective management and retrieval.

THE ELEMENTS

areaofwork_subject_versionnumber.extension

example: Networks_Cabling_v1_4.doc

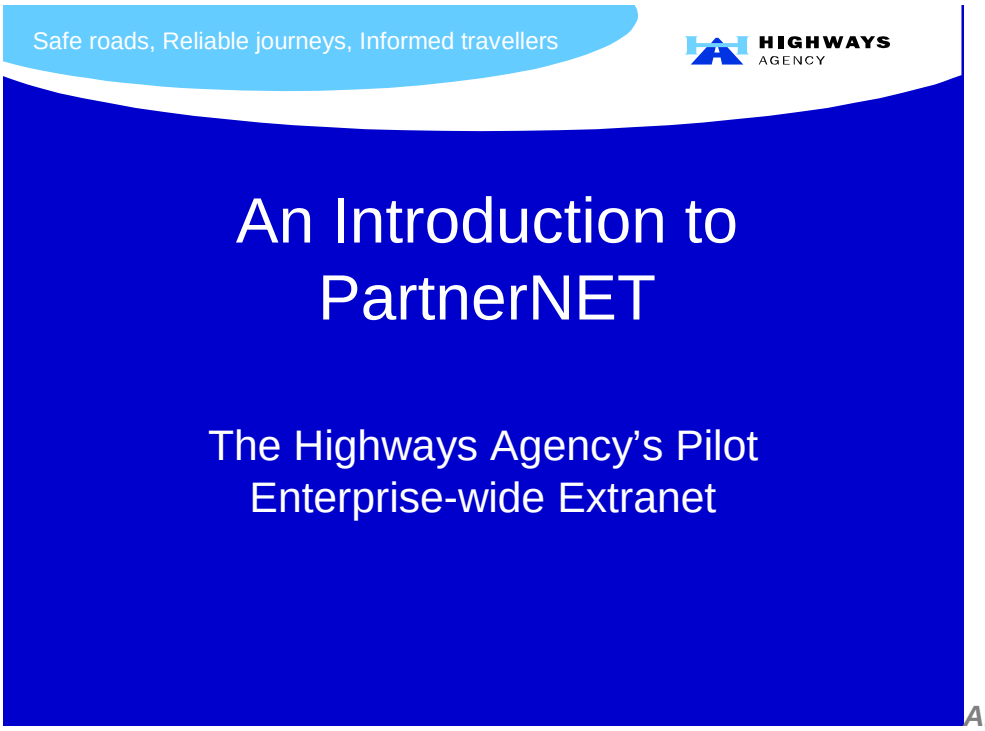
The file name must be in two parts. The first part defines the area of work to which the document refers. The second part describes the document's history.

area of work_subject_versionnumber.extension

This describes at a high level the subject and must be representative of the business function being conducted, for example: **NetworkStrategy**

Areaofwork_subject_versionnumber.extension

The subject is drawn from the document title and should be no more than 20 characters, for example: **A1Trafficflows**. Always use the same subject for a collection of documents that cover the same topic. Avoid using terms such as "Presentation", "Document", "Spreadsheet" in a file name, as this is made clear by the extension e.g. **.**ppt.



Areaofwork_subject_versionnumber.extension

The version number of the document should be included where applicable.

A common method for version control numbering is to use the ordinal number (1,2, 3, etc) for major version changes and after the underscore, the number for minor changes, as in:

v1_5; v1_0; v2_7

A version 1_0 normally denotes a first document version given wider circulation: a document moving from personal to corporate workspace.

Areaofwork_subject_versionnumber.extension

This is the standard file extension for the application; e.g. .doc for Word files, .xls for Excel spreadsheets, .ppt for PowerPoint presentations.

OPTIONAL ELEMENT

Areaofwork_subject_versionnumber_date.extension

When the date of creation/modification is of intrinsic value to the context of a document, the date should be set out in the following way: yyyymmdd, e.g. 20020326 for 26 March 2002. This ensures that file names are listed chronologically. This is optional because this information is contained within the metadata.

Do not use spaces in file titles as these create problems when files are stored. Complex folder structures that lead to long file paths should also be avoided.

Do not repeat descriptions that are included as part of the folder structure where the document is saved.

QUESTIONS and ANSWERS

Q. How should I use Abbreviations and Acronyms?

A. Abbreviations and acronyms must be to agreed standard use across your team or division and must be documented so that others may understand what is meant. The words must be written out in full at the first occurrence in any document.

Q. Can I use proper names?

A. Proper names should always use the full name. If the document is a letter, do not use the author's name, as they are not the *subject* of the letter.

Q. Should I use Agency standard templates?

A. Yes. These will help to capture information about each document. Further work is being done to improve standard templates to automatically capture much of the document metadata.

Q. Is there anything else I can do?

A. Yes. Use the footer facility in Word, Excel, and PowerPoint to add the full file path name to the document. Complete the MS Office Properties Card by selecting 'file'-'properties'.

Q. Do I need to use a registered file reference?

A. Yes. A file reference should also be included in the footer facility in Word, Excel and PowerPoint.

DOCUMENT CONTROL

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