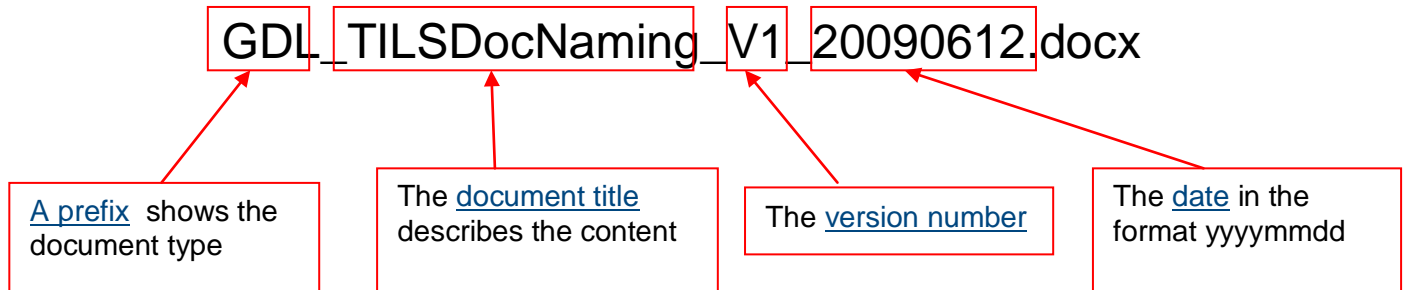


# TILS Document Naming Convention

Document naming for the TILS Division should follow this convention:



File names created from the TILS document naming convention are made up of four parts joined together with an underscore character ( \_ ). There should **not be any spaces** in the file name.

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## TILS Document Naming Convention - Parts

File names created from the TILS document naming convention are made up of four parts joined together with an underscore character ( \_ ). There should **not be any spaces** in the file name.

The parts are:

- [A prefix](#) which shows what type of document a file is,
- The [document title](#) which describes the content,
- The [version number](#) for the document, and
- The [date](#) which shows when it was created.

In addition two extra parts can be added – particularly for documents with a long drafting process;

- The [document status](#) which shows if a file is a draft or final document,
- The [author's initials](#) which show who last modified it.

More information about these parts is given below

### 1. Prefix – Document type

**(upper case, 3 chars)** - The first three letters of the file name give an indication of the type of document. Some examples include:

Prefix	Meaning
AGD	Agenda
AGR	Agreement
GDL	Guideline
MEM	Memorandum
MIN	Minutes and Notes
PRE	Presentation
PRO	Procedure
PRP	Proposal
REP	Report
TEM	Template

\* [Full list of all prefixes](#) \*

#### **Note;**

In the case of **Project Management Framework** documentation, to be sent to the Project Portfolio Office, add the extra prefix “**PMF**” to the **beginning** of the file name.

e.g.; PMF\_PRP\_ZenMonkeyProject\_V2\_20090607.docx

### 2. Document title/ Description

**(mixed case, max 30 chars, no spaces)**

- Describes the purpose or “business” of the document. Acronyms, capitalisations, abbreviations can be used, keep in mind that descriptions should be **meaningful** to anyone reading the file name.
- In the case of project documentation use the **project name** or its usual abbreviation
- If possible Departmental Branch and/or Section should be integrated into this field to indicate origin / ownership of document.
- Use only alpha-numeric characters, plus the hyphen and underscore.
- **Do not use spaces.**

### 3. Version

**(upper case, max 4 chars, optional)**

For documents that will continue in various versions use V followed by the version number. Use an underscore to indicate a decimal point if necessary.

Eg. PMF\_PRP\_ZenMonkeyProject\_V2\_20090607.docx

New versions should not be created for each iteration of the document, but rather at significant changes or when it has been reviewed or changed by another author.

### 4. Date

**(numbers, 8 chars)** The date of file creation, revision or approval.

Format is **yyyymmdd**, where:

- yyyy is the year,
- mm is the month ie. 07 for July
- dd is the day, i.e. 09 for the 9<sup>th</sup>

e.g. the 24<sup>th</sup> of January 2009 => 20090124

\* This format causes a list of files to sort into date order within the alpha numeric search.

### 5. Document Status

**(upper case, max 4 chars, optional)**

Start with **DR1** (DRaft 1) when the document is first created and end with **FIN** (FINal) to allow version control and tracking.

Documents that have a version number need not indicate DRaft or FINal status, but others should.

### 6. Author

**(upper case, max 3 chars, optional)**

Initials of document editor to enable **differentiation** between documents.

Used for DRaft documents only.

## Examples

Some examples of file names using the convention and their explanations.

### **GDL\_TILSDocNaming\_V1\_20090612.docx**

- Version 1 of the TILS Document Naming guidelines prepared on the 12<sup>th</sup> of June 2009

### **GDL\_EmailManagement\_V1\_20081120\_DR\_NR.docx**

- A draft of a set of guidelines for Email management, last edited by NR on the 20<sup>th</sup> of November 2008

### **REP\_EISSockReview\_V2\_20090330\_FIN.docx**

- Version 2 of a report about socks produced by EIS (Enterprise Information Systems a section of ITS) finalised on the 30<sup>th</sup> of March 2009

### **PRE\_LibDatabaseMgmt\_V1\_20090124.ppt**

- A powerpoint presentation about database management prepared by the Library on the 24<sup>th</sup> of January 2009

### **LTR\_UsingScissors\_V1\_20080526.wav**

- An audio file used as a learning and teaching resource about using scissors recorded on the 26<sup>th</sup> of May 2008

### **PMF\_PRP\_ZenMonkeyProject\_V2\_20090607.docx**

- Version 2 of a proposal ( using the project management framework) for a project about Zen monkeys prepared on the 7<sup>th</sup> of June 2009

## Why use a document naming convention?

Using a document naming convention for files that are shared; on a network drive, distributed to other staff or posted on a collaborative space such as SharePoint helps other users locate the document they need.

### Context

**Informative names to allow quicker access to required documents.**

By looking at the document's name a user should be able to tell what it is about. Remember that if you place a document in a shared space you want other people to be able to use it. They may want to access it in a year's time when no one remembers what it was called. You may move on to a new role and your replacement may be someone who was not there when the document was created.

### Sorting

**Structured names force a sorted display.**

When a folder is opened documents named by convention will be grouped by their Prefix, which gives the type of document, then alphabetically by name. Use of the *yyyymmdd* date convention causes all instances of a document over time to automatically sort by date.

### Version Control

**Easily recognise drafts from final versions.**

Including the DR or FIN suffix on document names allows users to easily tell whether a document is an authoritative final version, or is still in the process of being drafted. Including initials on draft versions also shows who was the last person to update the document.

### Sending Links

**Linking to documents is a good way of sharing information.**

Rather than emailing documents to other members of your department, for their contribution or information, a link to the document's location on a network drive or collaboration space can be sent. Excessively long document names or names with spaces in them can result in broken links in some applications.

## Why use the *yyyymmdd* date convention?

**This format causes a list of files to sort into date order within the alpha numeric search.**

e.g.

REP\_MonthlyExecutiveSummary\_20081125,  
REP\_MonthlyExecutiveSummary\_20081231,  
REP\_MonthlyExecutiveSummary\_20090124

As opposed to

REP\_MonthlyExecutiveSummary\_24Jan2009,  
REP\_MonthlyExecutiveSummary\_25Nov2008,  
REP\_MonthlyExecutiveSummary\_31Dec2008

Which sorts by the day number first and then by the name of the month alphabetically

## Document Templates and Metadata

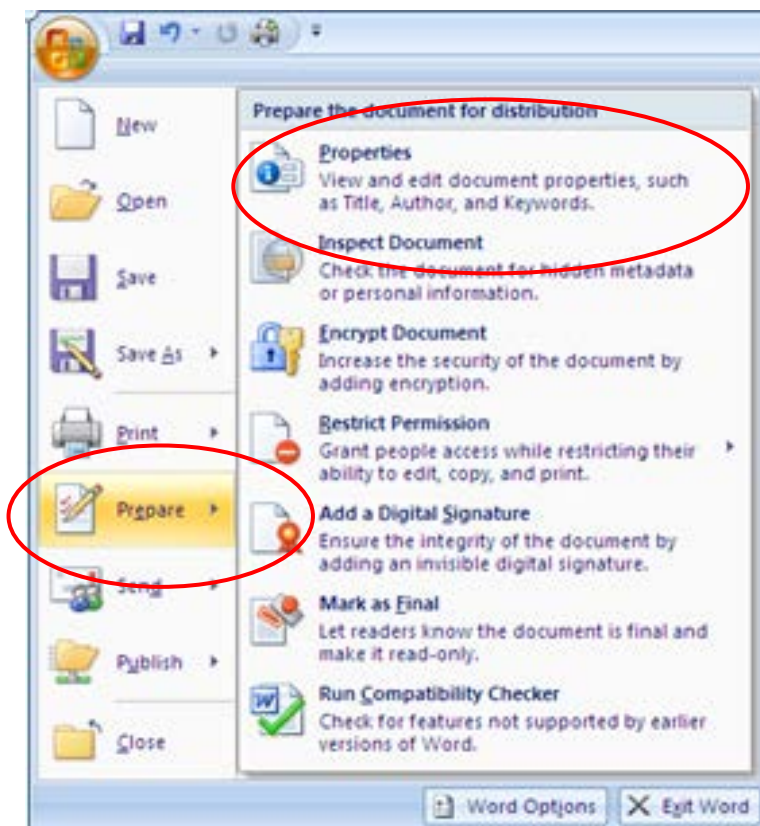
A range of document templates are available for QUT staff to download. These templates incorporate the TILS Divisional or Departmental banners for a corporate look and feel.

Document Templates are available from:

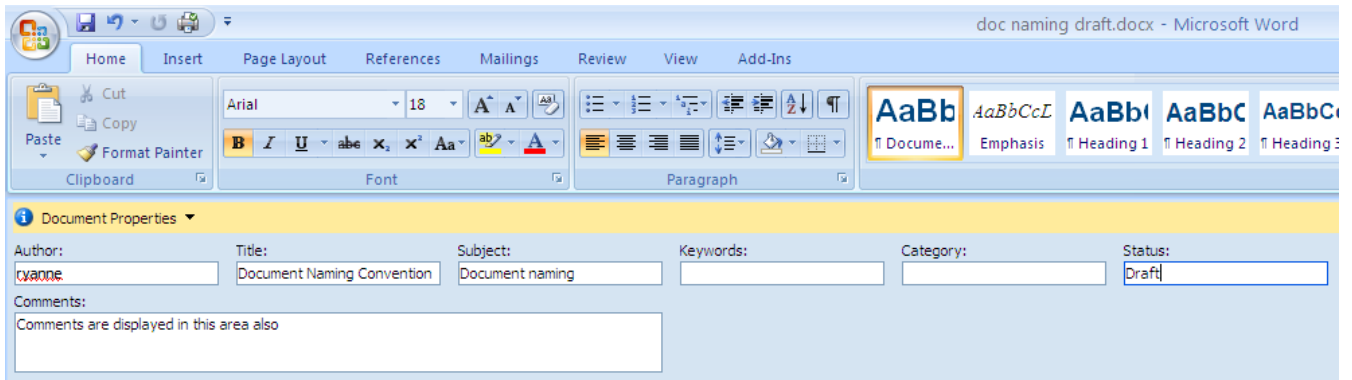
<http://www.tils.qut.edu.au/intranet/communicatio/templates/index.jsp>

TILS document templates also include a header and footer which automatically update with information about your document, such as the date, the file name and document title. (See the top and bottom of this page for an example).

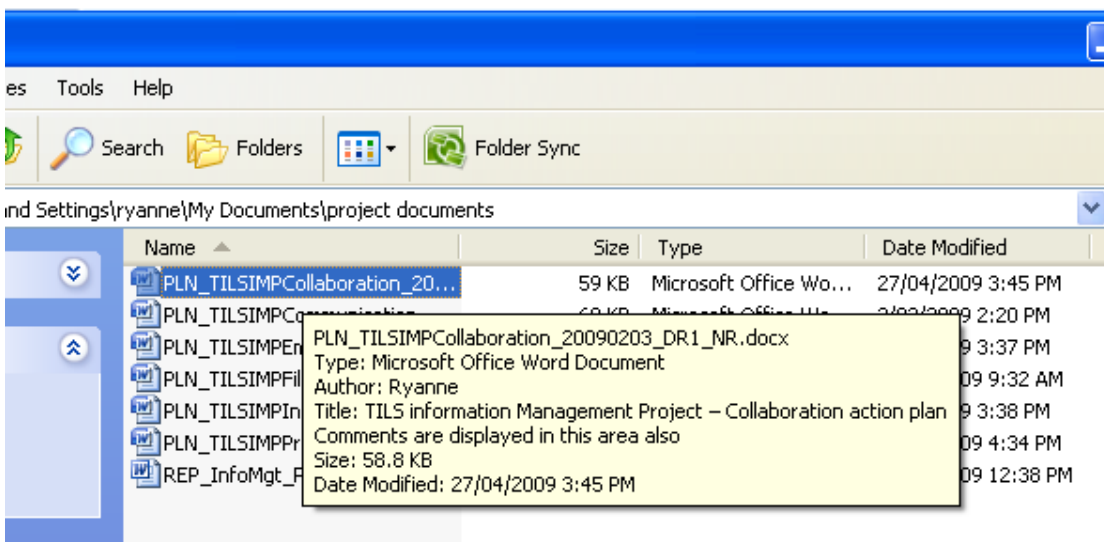
This information is called metadata; you can view and update your document's metadata by viewing the document properties. In Microsoft Word 2007 do this by choosing "Prepare" and then "Properties" from the Office button menu.



Document metadata will be displayed for viewing or updating



Hovering the mouse over a file will prompt the document metadata to be displayed.



## References

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<http://uim.curtin.edu.au/local/docs/DocumentNamingGuidelines.pdf>

National Archives of Australia (2007). *Titling documents – capture the purpose*.  
<http://www.naa.gov.au/records-management/create-capture-describe/describe/titling-records/index.aspx#section2>

Queensland State Archives (2005). *Managing shared drives*.  
<http://www.archives.qld.gov.au/publications/PublicRecordsBriefs/SharedDrives.pdf>

Queensland University Technology (2005). *Naming conventions for documents and folders on the Library's shared network space: I:\ drive*.  
[I:\Administration\\_Matters\Information\\_Management\Communication\Toolkit\STD\\_NameConvtn\\_05\\_Jul05\\_FIN.doc](I:\Administration_Matters\Information_Management\Communication\Toolkit\STD_NameConvtn_05_Jul05_FIN.doc)

Queensland University Technology (2008). *TALSS document naming quick guide*.  
[http://www.intranet.talss.qut.edu.au/policies\\_procedures/info\\_manage/naming.jsp](http://www.intranet.talss.qut.edu.au/policies_procedures/info_manage/naming.jsp)

Queensland University Technology (2008). *New document naming conventions for student documents in TRIM*. (<http://www.governance.qut.edu.au/news/trim/0805-dnc.jsp>)



## Prefix codes

**\*Tip\*** - use Ctrl F to search for the type of document you want

## Codes for Projects and Events

CODE	Description
ACR	Activity Completion Form
CPL	Communication Plan
IIS	Infrastructure Impact Statement
PCR	Project Change Request Form
PIR	Post Implementation Review Report
PNF	Project Notification Form
PPL	Project Plan
PRP	Project Proposal
QPL	Quality Plan
RMP	Risk Management Plan
SMA	Support and Maintenance Activity Request
STR	Status Report

**Note;**

In the case of **Project Management Framework** documentation, to be sent to the Project Portfolio Office, add the extra prefix **"PMF"** to the **beginning** of the file name.

## Committees and Meetings

CODE	Description	Description
ACT	Action List	Action items drawn from minutes or a meeting
AGD	Agenda	Meeting agendas
MIN	Minutes and Notes	Records of meetings, formal and informal
SUB	Submission	Formal submission to a review

## Teaching/ Training Documents

CODE	Description	Description
<b>ASS</b>	Assessment	Learning-related Eg. IFN001 assessment; ASS will also be useful for Liaison Librarians working with academics re student assessment.
<b>LTE</b>	Learning Teaching Evaluation	Learning / Teaching – to evaluate our teaching / resources, etc Forms, activities, tools, evaluation summaries.
<b>LTP</b>	Lesson Teaching Plan	Learning / Teaching Nb – strategic learning and teaching plans should use PLN.
<b>LTR</b>	Learning/ Teaching Resources	Learning / Teaching Activity sheets, quizzes, handouts.
<b>PRE</b>	Presentation	Slides and/or notes for a presentation
<b>SBG</b>	Subject Guide	Documentation describing useful subject resources
<b>WSH</b>	Workshop	Documentation prepared for workshops

## General and Operational documents

CODE	Description	Description
<b>AGR</b>	Agreement	Agreement between two or more parties e.g. Annual Maintenance Agreement
<b>BGT</b>	Budget	Documentation relating to budgets, including budget forecasts, budget tracking sheets etc
<b>COR</b>	Correspondence	All correspondence to and from external parties; Emails, letters, faxes etc
<b>EOI</b>	Expression of Interest	EOI's for job opportunities, grant applications, fellowships, call for project tenders
<b>EVL</b>	Evaluation	Evaluation and Feedback documentation, eg for workshops, conferences, seminars, etc ( Form Templates use TEM)
<b>FRM</b>	Form	Completed forms only, form templates use TEM. E.g. Copies of requests to attend staff Training (the green form)
<b>GDL</b>	Guidelines	Documents produced for staff outlining guidelines for processes or activities
<b>IMG</b>	Image	Photos, images, graphics
<b>INS</b>	Instruction	Includes Work Instructions and Publications Delivery Instructions
<b>INV</b>	Invoice	Documentation indicating products, quantities, and agreed prices for products or services
<b>LST</b>	List	Any lists including Create Lists

<b>CODE</b>	<b>Description</b>	<b>Description</b>
<b>MAN</b>	Manual	Collection of information about a service or system
<b>MAP</b>	Map	Maps including floor plans
<b>MEM</b>	Memorandum	Internal Communication
<b>OLA</b>	Operating Level Agreement	Defines the interdependent relationships between internal support areas working together to support an SLA
<b>ORD</b>	Order	An order placed with an external supplier
<b>ORG</b>	Organisational Chart	A chart indicating the relationships between different departments or organisational areas.
<b>PLN</b>	Plan	Planning documentation Includes Strategic Plans, Action Plans, (Use LTP for LESSON teaching plans and IRP for School Information Resource Plans).
<b>POL</b>	Policy	Official departmental or divisional Policy
<b>POS</b>	Position Description	Documentation describing the roles and responsibilities of a particular role.
<b>PRO</b>	Procedure	Procedures and work instructions
<b>PRQ</b>	Purchase Requisition	Documentation relating to requests for the purchase of goods and services
<b>PSC</b>	Scholarly publication	Including conference papers
<b>PUB</b>	Publication	Publications for informational and promotional purposes, including social newsletters
<b>PUR</b>	Purchase Order	Documentation indicating types, quantities, and agreed prices for products or services the seller will provide to the buyer
<b>RAW</b>	Raw Data	Any type of file containing Raw Data collected by any means. This file stores the original data before it is modified into any type of report, graph, correspondence etc.
<b>REP</b>	Report	Including Monthly, Quarterly, Yearly Reports.
<b>ROS</b>	Roster	Documentation about staff working arrangements
<b>SGN</b>	Sign	Signage for display
<b>SLA</b>	Service Level Agreement	Defines the support relationship between a service provider and its clients
<b>SPC</b>	Specification	A detailed description or assessment of requirements, dimensions, materials, etc.,
<b>STA</b>	Statistical tracking	Data (numerical) evaluating or tracking services or performance Statistical spreadsheets and other evaluation data
<b>STD</b>	Standard	Documents describing standards or conventions Use GDL for actual guidelines, and other applied use of standards

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<b>CODE</b>	<b>Description</b>	<b>Description</b>
<b>SVY</b>	Survey	Questionnaires for distribution, for survey templates use TEM
<b>TEM</b>	Template	An electronic file with a predesigned, customized format and structure, as for a fax, letter, or expense report, ready to be filled in.
<b>TIM</b>	Timeline	Document describing timing.
<b>TSH</b>	Timesheet	Documentation relating to staff members working hours
<b>WPT</b>	Web page test	Web pages planned or done first in a text based editor before loaded as HTML