
Naming Conventions

Posted by Matthew Lipscombe - 2008/05/07 12:29

We are often asked what naming conventions we suggest for organisations implementing EDRMS - the key is, we believe, to keep it simple.

While at first glance it seems hopelessly naïve, a simple policy along the lines of "titles for files and documents should be long, typically greater than five (or whatever) significant words" can be surprisingly effective and is used by a number of large and small organisations with RM compliance obligations.

Note that this assumes that the BCS forms part of the metadata and is not required as part of the title.

The advantages of this policy are:

- Simple, easy to communicate and easy to train
- Can be reliably implemented by users
- Flexible enough for people to make a judgement call
- Ideal for decentralised or semi/un-controlled creation
- Easy to monitor and provide guidance
- Policy is not dated due to business and other changes

Of course, if the creation of Files and other objects is centralised and control can be reliably implemented and regularly updated, have a naming convention by all means.

Note: Windows does have some limitations with respect to the characters that can be used within the file system - which DocBanq strips out upon export. You may wish to specify that names shall not contain `\/:*?"`

=====