

Standardize your documents

Employees often don't realize how critical a document name can be when searching for and retrieving documents, or even to make sure you're working on the right one! Some of the biggest challenges with naming documents arise when employees are working collaboratively on a single document, or when document names are not used consistently over time, making them difficult to find. This often results in time wasted searching or mistakes made by working on the wrong version of a document. Sometimes employees end up resaving the same document in multiple places with multiple names to ensure that they can find it later.

One way to avoid, or minimize, these challenges is by creating and using *standardized naming conventions*. It may sound scary and complicated, but essentially it means documents are named the same way every time.

For example, monthly invoices can be named this way:

= Staples Office Supplies 201608

By using the standardized naming convention, all Staples invoices will appear together in your document list sorted chronologically from January to December. This makes it easier to locate documents and may also assist with version control, especially if you're using a shared network drive.

Tips for creating standardized naming conventions include:

1. Select names that are clear, concise and meaningful.
 - a. Include the document type (e.g., Invoice, Template, Procedure, Process, Report, Minutes, Agenda, etc.).
2. Sit with your team to develop standardized naming conventions for commonly used documents.
 - a. Write them down.
 - b. Educate the team about using them.
 - c. Enforce the naming conventions.
3. Avoid acronyms and abbreviations, which lose meaning over time.
4. Use the ISO standard for writing dates: yyyyymmdd (largest to smallest).

Once established, use the new naming conventions going forward. Rename any existing critical documents to match.