File naming

Digital files must have names that allow viewers to understand the purpose and content of the file. A user who offers a descriptive file name makes operations easier and, ultimately, saves clients' time and money.

Definition

A “digital file” means any computer-readable document, regardless of file type or file extension, that is meant to be stored on the firm's Nextcloud database.

Naming conventions

Digital files should bear names that include the following categories of information, in descending order,

1. the client and matter number to which the file belongs (omit placeholder zeroes);
2. a word or characters that describe the file's purpose;
3. an abbreviated date of the file's creation (where applicable or useful);
4. a short description of the file's contents; and
5. the file extension (which is automatically generated by the computer–do not manually change file extensions).

For ease of reading, please render categories one (1), two (2), and three (3) in all capitals; category four (4) should be rendered in lowercase, unless the initial capital exception (*infra*) is applied.

Punctuation

File names should not contain blank spaces. Punctuation must be used to separate information in file names. Punctuate a file name using an underscore (_) or a dash (-). Do not use a period in any part of the file name, save to separate the name from the file extension.

An underscore (_) should be used to separate the above categories of essential information.

A dash (-) should be used to separate information or words that fall within the above categories of essential information. If many words are used in a description, the dash may be omitted in favour of initial capitals for each new word in the string.

Use a period (.) to separate the file extension from the rest of the string.

Examples

Pleadings

Pleadings may not require a description, for, in many cases, the file's purpose is sufficient. If, however, a pleading serves dual purposes (e.g. a defence and counterclaim), provide the main purpose (in our example, a defence) and indicate that a counterclaim is included in the description.

`34-1_APPL_FEB-2-23.odt`

`43-1_DEFENSE_MAR-12-23_w-counterclaim.pdf`

Matter journal / notes to file

Files included in the matter journal folder of a matter file do not require the client and matter numbers in the file name. They are instead sequentially numbered to preserve a chronological order of files in the matter journal.

`1.MEETING_APR-18-23_attendance-resto.md`

`2.NOTES_APR-25-23_initial-review.md`

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