Establish File Naming Conventions

If you don't have a DMS, then you need to establish the rules by which files will be saved and named.

1. **The Old Way**: File naming has become more intuitive since Windows 3.1 (we used to be limited to 8 characters). Document extensions used to identify the type of document (.ltr, .fax, .dep, .pld, .cor, etc.)

2. **The New Way**: You now have 255 characters to name a file or folder in Windows. Therefore:

    •   Then: wjcpc01.dep

    •   Now: 2004-10-30 - James Smith Perjury Case Deposition 01.doc

3. **Acceptable Characters**: A file name may contain any of the following characters: ^ & ' @ { } [ ] , $ = ! - # ( ) % . + ~ _

4. **Unacceptable Characters**: A file name may not contain any of the following characters: \ / : * ? " < > |

5. **Recommended Protocol**: If you would like everything sorted by date (which is what most lawyers like), simply precede every file name with a date, year first. If you enter the date month/day/year, then all of the January files (for all years) are lumped together, all of the February files are together, etc. Our file naming convention:

    2004-10-30 - Letter to Bill Biviano re billing system.doc

    The date indicates the date the document was mailed out if it's a letter; and the longer description makes it clear what this document contains without even opening it. If you are scanning a document you received, then the date should be the date the particular document was received.