

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.

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.)

THE NEW WAY

You now have 255 characters to name a file or folder in Windows. Therefore:

- Then: wjpc01.dep
- Now: 2004-10-30 - James Smith Perjury Case Deposition 01.docx

ACCEPTABLE CHARACTERS

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

UNACCEPTABLE CHARACTERS

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

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 John Doe re billing system.docx

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.