

NAMING FOLDERS AND FILES

It is important to have an agreed approach to naming Folders and Files which everyone who uses the shared folder understands.

The agreed system should above all be:

- Simple and easy to use
- Clear and logical
- Concise
- Consistent
- Standardised where necessary

Benefits of Naming Conventions

Naming Conventions are a set of rules or guidelines on naming Folders and Files. The main reasons for having an agreed approach are:

- It will be easier to locate information even if you are not the author of the document. This is because you are more likely to recognise and understand the way the file has been named.
- It will be easier to search for information and be confident that you have found everything you need. Again, because files will have been named consistently your file search is more likely to retrieve all information relating to a particular topic.
- By following a few simple rules, you can ensure that files are automatically ordered in a logical way – for example, by always naming correspondence with the surname first, you will ensure that all letters relating to 'Smith, J' will be organised together.

Naming Files/Documents

It is recommended that users of the Shared Folder agree some basic rules for naming individual documents using this checklist:

1. Use standard Acronyms

If acronyms need to be used, it is recommended that these are standardised and agreed by the team. Acronyms or abbreviations which have not been agreed by the team should be avoided.

Some examples are:

Committee names – these should follow the University system, such as ASC (for Academic Standards Committee)

Sector wide acronyms – these should follow the commonly recognised usage, such as RAE (for Research Assessment Exercise) or HEFCE (Higher Education Funding Council for England).

Faculty or Service acronyms – for acronyms where there is no standard usage, the users of the Shared Folder should agree these and aim to use them consistently. These should be developed into a list which can be updated from time to time.

2. Use clear and objective names

Try to use names which will mean something to other people who may need to access them in future.

For example:

Good Practice	Bad Practice
'Procurement Policy 2007'.	'Current policy on Procurement' – this title will be meaningless in a year's time!

3. Avoid repetition and redundancy

You do not need to repeat descriptions which are already included in the parent folder or in the file extension.

For example:

Good Practice	Bad Practice
<p>Information Survey/2007/Questionnaire.doc –</p> <p>In this example, the Word document name 'questionnaire' is simple and concise and does not repeat any unnecessary information. 'Information Survey' and '2007' are already included in the folder titles.</p>	<p>Information Survey/2007/ 2007 Information Survey Questionnaire.doc</p> <p>In this example, the document repeats the information already covered in the folders and makes the title unnecessary long.</p>
<p>'Information Survey.ppt' is sufficient.</p>	<p>'Information Survey PowerPoint Presentation.ppt'</p> <p>The last two words are unnecessary as the File Extension automatically shows that the document is a PowerPoint Presentation.</p>

4. Structure titles in the best way to enable documents to be retrieved.

Think carefully about how you are likely to want to retrieve documents later. For example, if you normally search for records by date, or by surname, then put these elements first. This is because the file directory will automatically group documents according to the first word of the title.

For example:

Good Practice	Bad Practice
SmithJMemo – this will mean that all correspondence relating to J Smith will be grouped together in the folder.	MemoJSmith – this will mean that all documents called ‘memo’ will be grouped together.
20050601Minutes – this will mean that the document will be grouped according to date (1 st June 2005 in this example)	Minutes010605 – this will mean that all documents called ‘minutes’ will be grouped together. 010605 Minutes – although this is the most intuitive way of naming documents, it means that they are grouped according to the day of the month (e.g. the first), regardless of what month or year the date actually falls in.

5. Keep Names Concise

Long file names create long file paths which are more difficult to remember and more likely to cause problems if you send the link via e-mail.

Good practice is to limit titles to around 16-20 characters maximum and to keep file paths short and simple.

Good Practice	Bad Practice
Information Survey/2007/Survey Forms Returned	Records Management Information Survey/2007 Survey/Collation of Results/Analysis Project/Survey Forms Returned 2007

6. Use standard formats for dates and personal names

Using standard formats will mean that documents are grouped together in a logical way.

For dates, the format YYYYMMDD should be used as this will ensure files are grouped in chronological order.

For names, good practice is to use the format Surname, Forename as this will mean that documents are grouped by Surname.

Good Practice	Bad Practice
'20050601 Minutes' – this will mean that all the documents relating to this particular meeting will be grouped together.	'June 05 Minutes' – this will simply group together all documents with the title 'June' regardless of the actual date of the meeting.
'Smith J Memo' – this will ensure that all documents relating to J. Smith are grouped together	'J Smith Memo' – this format will mean that all documents relating to people with a forename beginning with J will be grouped together.

7. Use Standard Formats for Correspondence

The recommended format for titling pieces of correspondence is:

Surname Forename YYMMDD – for sent items

And Surname Forename YYMMDD Rcvd – for received items.

For example:

Good Practice	Bad Practice
<p>Smith J 061208.doc</p> <p>Or</p> <p>Smith J 061210 Rcvd.doc</p> <p>This will mean that all correspondence relating to J Smith is grouped together and you will be able to clearly see whether the letter was received or sent as well as the date.</p>	<p>Letter J Smith.doc</p> <p>This will mean that correspondence with J Smith will be hidden away with all other documents titled 'letter'. It will also make it more difficult to search on the date the letter was sent.</p> <p>Smith J 081206.doc</p> <p>This will mean that letters to J Smith will be grouped according to the day of the month, regardless of which month or year they actually fall within.</p>

8. Be precise about Naming Folders

The names of Folders should ideally be agreed at the time the structure is initially created, but will then be added to as new activities or functions develop. Folders should be named as follows:

Levels 1 and 2 of the structure – these should reflect the key functions of the administrative or academic unit to which the shared area relates. Levels 1 and 2 should normally be fixed – they should only need to change rarely, for example, if a new function is created.

Levels 3 and 4 – It is good practice for the lower levels to use descriptive words which make it clear exactly which activity or process is contained in the folder:

Good Practice	Bad Practice
'Paying Invoices' Or 'Invoice Payment'	'Invoices'

Further Links

Further information can be found at:

<http://www.jiscinfonet.ac.uk/records-management/guide-for-administrators>

http://www.nationalarchives.gov.uk/documents/managing_elect_docs.pdf

<http://www.ncl.ac.uk/rm/FileNamingConventions-00.htm>

