

Folder & File Naming

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Contents

1. File Naming.....	3
2. Limits to names and path length.....	3
3. Numbers to order folder and file names.....	3
4. Spaces between words.....	3
5. Non-alphanumeric characters.....	4
6. General tips.....	4
7. File name order.....	5
8. File names of digital images.....	5

Appendix: Examples of Good & Bad File Names..... 7

1. File Naming

When naming a file it is important that consistency is maintained to reduce duplication and allow files to be found and accessed efficiently. A file name may include the following components:

- Title
- Date (Optional)
- Status e.g. Draft or final/released version (Optional)
- Version number (Optional)
- Extension (supplied by the application, e.g. Word is .doc, Powerpoint is .ppt)

2. Limits to names and path length

Long file names mean long file paths which increase the likelihood of problems when sharing and exchanging files. File names should be kept as short as possible and meaningful to others.

Ensure the file name does not exceed 50 characters in length (including spaces and document extension). Even if the file name is only 50 characters long, it might exceed the total 250 recommended character length of the file path because of where it sits in the file plan. Therefore please also keep folder names as short as possible and keep the number of folders and subfolders to a practical minimum.

If a file is to be truly compatible across platforms, it should be limited to eight characters, followed by a three-character extension (e.g. 12345678.doc).

3. Numbers to order folder and file names

File directories display names in alphanumeric order. To maintain the correct order it is necessary to always give at least two-digit numbers instead of one, i.e. '01' instead of '1'. This way 'document01.doc' will come before 'document11.doc' in the directory list.

4. Spaces between words

Some software packages have difficulty recognising file names with spaces. The use of links to refer to files on the Intranet or websites (known as URLs) mean that all spaces will be translated with a '%20', so it is best to avoid using spaces. There are two options to solve this issue:

- Use capitals instead of spaces to differentiate between the words, e.g. CourtMinutes.doc. However whilst Windows file names are not case sensitive, using capitals with other software may cause some problems.
- Use underscore (_) or hyphens (-) instead to make the file name readable, e.g. court_minutes.doc. However this does increase the length of the file name.

5. Non-alphanumeric characters

The use of non-alphanumeric characters (e.g. a-z and 1-10) in file names should be avoided to allow for maximum compatibility with different operating systems (e.g. Linux, Windows) because different systems may not recognise certain characters in a file name or they may have specific uses within certain systems, which may create confusion or errors:

- Avoid the following characters in file names: * : \ / < > | " ? [] ; () = { } + & £ \$, . ^ %
- Most non-alphanumeric characters can be omitted without much loss of meaning, e.g. commas and quotation marks. Others can be replaced with alphanumeric characters, e.g. "&" and "+" can be replaced with "And" and "Plus". Hyphens can be used in place of forward slashes and brackets.
- Do not use a full stop (.) or hyphen (-) as the first character of a name and do not use a full stop after the file extension as the last character of a name because some systems have rules for what is allowed as the first character of a filename and a final full stop may confuse the system when reading the three letter extension.

6. General tips

- Avoid using initials, abbreviations and codes that are not commonly understood. Where standard abbreviations exist use these.
- Avoid words such as "the", "a", and "and" which add length to a file name but do not contribute towards the meaning.
- Avoid using common words such as 'draft' or 'letter' at the start of file names. Filing in this way groups documents together which are not necessarily related. For example, it will be more useful to find the draft budget report next to the previous year's budget, rather than next to an unrelated draft record.
- Never use the words "general", "other", "misc" or "miscellaneous" to describe files and folders. "General" or "Misc." folders are used as dumping grounds and do lead to duplication and lost documents.
- Include unique identifiers, references and relevant keywords within the title.
- Standardise language and abbreviations and if necessary use an approved thesaurus.
- Never simply accept what the operating system provides as a file name when you click 'File', 'Save As'. Accepting what the operating system provides you means the file "name", will be the first sentence of the document. This is often meaningless and makes the document difficult to find again.
- If using a date as part of the file name, such as for minutes and agendas for regular meetings, use the format YYYY-MM-DD to enable documents to be sorted in chronological order. NB. The document properties will show when the document was created, so you may not need to use the date in the file name.
- If using a date in the file name, remember to separate the year, month and day with a hyphen (-). 2019-06-02 is easier to read than 20190602, which might look like a reference number.
- The file name should not include words already used by the name of the folder it is in or those above it, e.g. './.../Court/2019-01-30-CourtMinutes.doc' should

be './.../Court/2019-01-30 Minutes.doc'. However, if the file is used out of context, you may need to include more details.

- File names used for correspondence should include the name of the correspondent, date and content.
- If using a personal name as part of the file name, such as when saving correspondence, use the surname first followed by initials, e.g. BloggsJ
- Avoid using the document creator's name in the file name unless it is critical to identify it from other similar documents – this should be evident from the document content or properties.
- When saving emails in the file plan remove details such as "FW," and "RE," and rename the email appropriately in accordance with the actual content of the email. This ensures that the emails are sorted according to their subject rather than being clustered together. Web pages should be saved as "Web Archive – Single File," (*.mht) format. This will disable all links and save the selected area only.

7. File name order

The elements to be included in a file name should be ordered according to the way in which the document will usually be retrieved. This will depend on the way you work:

- If documents are retrieved according to their description, such as names of events, this element should appear first in the file name, i.e. arts festival 2019-02-05.doc.
- If the date is more necessary with retrieval, such as with minutes and agenda, the date element of the file name should be first, i.e. 2019-03-02Minutes.doc.

8. File names of digital images

File names for digital images may have to be dealt with slightly differently to other electronic documents due to the volume that may be filed. File names for images can be descriptive or non-descriptive:

- Descriptive file naming systems, as dealt with above, tend to suit smaller collections of digital images where the required image can be located by browsing through a set of descriptively named folders and files. E.g. a collection of 20,000 film posters might be divided up first by decade, and then by the film title's initial letter, followed by a number for the individual image. So a filename for a poster of *Gone with the Wind* might be: 1930g001.tif.¹
- The advice given above on numbers in file names also applies here. Using three digits and numbering images from 001 to 999 allows for up to 1000 images, but if there are more than a thousand film titles starting with the same letter, for example, to avoid lengthy file names more images can be stored by only giving each file a number as a name, which allows for at least eight digit numbers. This system relies on a descriptive folder structure to identify individual files, as many of the filenames will not be unique (care is needed when filing on Windows Explorer).

¹ Example taken from File Naming guidance from Technical Advisory Services for Images (TASI) website: <http://www.tasi.ac.uk/advice/creating/filenaming.html#fn3>, 26/11/2007.

- Non-descriptive filenames suit larger collections, particularly those using an image management system (IMS) to aid search and retrieval. The IMS would normally create the images internally, generate unique filenames automatically and then store metadata on each image. Each file has a unique but meaningless number as its filename. A collection that is too big to be easily browsed relies on a database to locate the files, which makes descriptive filenames unnecessary.
- The file naming system should also take into account the creation of surrogate images - those files made from the archive image for putting on the web or for printing. It is not necessary for the surrogate files to use the 8.3 file name structure, therefore suffixes could be added to the file name to differentiate from the original, e.g. a possible surrogate of 1930g001.tif could be 1930g001tn.jpg, with the added 'tn' standing for 'thumbnail'. The other option, which would keep the same file name as the original but have folders for different sized surrogates. As long as the surrogates can be linked back to the original, any system can be adopted.

Appendix: Examples of Good & Bad File Names

Good

Example	What is good about this?
Inform-article-v0.1draft.doc	<ul style="list-style-type: none"> · Filename describes the contents of the document · Shows that it is the first draft version of the document · The extension .doc shows that it is a Word document
Inform-article-v0.1-DT.doc	<ul style="list-style-type: none"> · The addition of DT's initials shows that the document has been reviewed and commented upon, while still keeping the original intact
Inform-article-v1.doc	<ul style="list-style-type: none"> · The use of 1 in the version shows that this document has been finalised and approved
2019-02-01_CorporateBoard_Minutes.doc	<ul style="list-style-type: none"> · As this document is date-specific, covering minutes of a regular meeting, the date is used first in the file name, to sort it appropriately · The date uses the format YYYY-MM-DD to ensure the computer sorts it in chronological order · The rest of the title is descriptive enough to give context, but does not contain unnecessary detail
JonesS_2019-02-06_AcceptanceLetter.doc	<ul style="list-style-type: none"> · A personal name is used in this filename, as it is correspondence, with the surname first · As this is correspondence, it also includes the date and the content

Appendix: Examples of Good & Bad File Names

Bad

Example	Why is this bad?
2019-06-05 SLF presentation.ppt	<ul style="list-style-type: none"> The extension ".ppt" tells you that this is a Powerpoint document, so does not need the word "presentation" in the filename
CR631-accform.pdf	<ul style="list-style-type: none"> Use of potentially meaningless number/letter combination Use of local abbreviations - could be "accommodation form", "accession form" etc
HQLIST02.doc	<ul style="list-style-type: none"> No use of capitals or hyphens between words, for ease of reading Number may or may not imply a version
EdwardsA-ajd.doc	<ul style="list-style-type: none"> Although this document is correspondence, you would not know this from the title Filename contains the name of the author, which is unnecessary as it should be contained in the properties No space between surname and first name of correspondent
Memo from H&S Driving at Work.msg	<ul style="list-style-type: none"> Use of common word like "memo" at the beginning of filename Filename does not describe content of document, just where it originates from Use of & in the name
FW:Presentation.rtf	<ul style="list-style-type: none"> An email which contains "FW", and will therefore be sorted that way in the filing scheme Does not give any indication of sender, presentation title or date