The Ohio State
University

University Libraries: Best Practices for File Naming

January 2016

INTRODUCTION

Just like paper files, electronic files need to be well-organized and labeled correctly so that they are identifiable, easy to find and accessible by all employees. This is especially important for employees of Ohio State in order to comply with the University's Records Management Policy, the State's public records laws and to provide for efficient and effective use of the University's documentary resources. Efficient and effective management of electronic records begins with accurate, standardized and consistent file-naming. The Ohio State University Libraries' Web Governance Committee has developed the following guidelines as a companion to the *Drafting and Publishing OSUL Content* guidelines.

Electronic records may include documents, spreadsheets, databases, images, video, and audio. If not managed, a computer may assign a unique name for these files when saved, but these names do not provide a context for the file, nor are they logical. For example:

- ➢ file name for a Microsoft Word document consists of the first few words written on the first page
- ➢ images are frequently labeled with sequential numbers

These types of file names do not promote accessibility and ease of identification.

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You may have had occasion to regret using file names that are not very descriptive in your own folders, or had trouble locating files in shared folders. Documents are easier to identify if their file names make it clear what the item contains. This is especially true of items that are placed in the Document Registry and departmental share-drive folders, as well shared by other means such as BuckeyeBox or email. A file name should be clear to everyone in the department or division or on collaborative teams such as committees, task forces and work groups. A document should be distinguishable from files with similar subjects, as well as different versions of the same file:

- **Not Good: Minutes.docx**
- **Better: Minutes-Exec-Committee.docx**
- **Best: Minutes-Executive-Committee-20150811.docx** (where the date stamp is the date of the meeting)

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For ease of explanation, the examples in these guidelines will focus primarily on documents; however, the best practices outlined below apply to all electronic record formats. These guidelines are aimed at managing the day-to-day business, project, and official University Library documentation in the J-Drive, BuckeyeBox, and Document Registry; however they could be applied in other University Library situations. While the following are best practice guidelines—and therefore highly recommended—every guideline may not be relevant to every situation. Regardless, this document should provide a foundation for developing consistent and easy to use file-naming procedures to be utilized by University Libraries' personnel.

NOTE: When placing documents in the OSUL Document Registry, the guidelines pertain not only to the file name, but also to the document title – SEE GUIDELINE #10

GUIDELINE #1

DO NOT use special characters in a file name. \ / : * ? “ < > | [ ] & $, .

- ***The characters listed above are frequently used for specific tasks in an electronic environment. For example, a forward slash is used to identify folder levels in Microsoft products, while Mac operating systems use the colon. Periods are used in front of file-name extensions to denote file formats such as .jpg and .doc; using them in a file name could result in lost files or errors.***

GUIDELINE #2

DO NOT use special characters such as !@#$%& to prefix a file name*

- This practice is used to “game the system” to get a file name to rise to the top of the list. This defeats the purpose of creating consistent file names that can be expected to be found in alphabetical order when browsing.

GUIDELINE #3

Use hyphens instead of periods, underscore or spaces

- As mentioned above, periods already have a specific function in a file name, which is to tell the computer program where the file-name extension begins. Spaces are frequently translated in a Web environment to be read as “%20” and underscores are lost in hyperlinking and underlining. For example:

👍 The document **File-Naming-Convention-20150810.docx**

👎 If spaces are used: File Naming Convention 20150810.docx would appear as **File%20Naming%20Convention%2020150810.docx**

👎 If underscores are used: File_Naming_Convention_20150810.docx would appears as **File_Naming_Convention_20150810.docx**

GUIDELINE #4

Capitalize each word in the file name:

- This allows for ease of readability:

👍 File-Name.docx vs. 👎 file-name.docx

GUIDELINE #5

Use “military style” descriptions: Noun, Adjective(s)

- This practice is allows for better browsabilty of lists of documents. Like documents are aggregated together and arranged in an ascending alphabetical order.

- Example if one is looking for “minutes” one would expect to find them in the Ms:

  👍 **Good: Minutes-Web-Governance-20150728.docx**

  👎 **Bad: Web-Governance-Minutes-20150728.docx** (they would show up in the Ws and not appear with the other minutes)

GUIDELINE #5

Use “military style” descriptions: Noun, Adjective(s)

- Sometimes a modifier is necessary as the “noun” is too generic and/or the term is more often thought of as a compound noun, for example:

  👎 It would be odd if this document **“File-Naming-Convention.docx”** were named **“Convention-File- Naming.docx.”**

  👍 It is more appropriate to say **“floor plan”** than **“plan, floor.”** Therefore, the file should be named: **Floor-Plan-18th-Avenue- 3rd-Floor.CAD**.

GUIDELINE #6

Include dates, formatted consistently at the end of the file name:

- The most appropriate format when wanting to include a “date stamp” in a file name is File-Name-YYYYMMDD. This allows for more alphanumeric and chronologic sorting; the “date-string” must include all eight (8) digits, zero-filling where necessary in month (MM) and day (DD):

- This allows for like documents to sort collectively:
  - 👍 Annual-Report-Exhibits-Committee-20150630.docx
  - 👍 Annual-Report-Web-Governance-Committee-20141231.docx
  - 👍 Minutes-Web-overnance-Committee-20150229.docx
  - 👍 Minutes-Web-Governance-Committee-20150728.docx

GUIDELINE #6

Include dates, formatted consistently at the end of the file name:

- If used as prefixes, one ends up with jumble of files:
  - 👎 20141231-Annual-Report-Web-Governance-Committee.docx
  - 👎 20150229-Minutes-Web-Governance-Committee.docx
  - 👎 220150422-Report-Web-Governance-Committee-.docx
  - 👎 20150515-Report-Web-Governance-Committee.docx
  - 👎 20150630-Annual-Report-Exhibits-Committee.docx
  - 👎 20150728-Minutes-Web-Governance-Committee-.docx

GUIDELINE #6

Include dates, formatted consistently at the end of the file name:

- If not done in a YYYYMMDD manner, one ends of with disordered and sometimes indistinguishable files:
  - Certainly any document from 2001 through 2012 the years and months could be confused: Minutes-Web-Governance-Committee-120701.docx→ is this December 7, 2001 or July 12 2001 or July 1, 2012?
  - If we used MMDDYYYY (Minutes-Web-Governance-Committee-07282015.docx) it will not sort chronologically and end up being mixed in with all files from “07” or July
  - If we use the month alpha-name (Minutes-Web-Governance-Committee-July2015.docx) it will not sort chronologically

GUIDELINE #7

To more easily manage drafts and revisions, include a version number on these documents

- If several drafts are created on the same day use a versioning convention:
  - 👍 Report-Draft-20150728-v01.docx; Report- Draft-20150728-v02.docx; Report- Draft-20150728-v03.docx
  - 👎 Remember to zero-fill appropriately as most file system will sort in the following order if not zero-filled: v1, v10, v11, v2, v3…

GUIDELINE #8

The file name should be clear and concise, yet include sufficiently descriptive information independent of where it is stored:

- Files are frequently copied to other folders, downloaded, and emailed. It is important to ensure that the file name, independent of the folder where the original file lives, is sufficiently descriptive.
- If the Minutes document for the Digital Reformatting Work Group is stored in the following folder: J:\working groups\Committees\Digital Reformatting\Agendas&Minutes\DRWG-2014\
  - 👎 …and is named Minutes-20140103.docx, if moved it loses the context that it is the Minutes for the Digital Reformatting Work Group.
  - 👍 A more appropriate file name would be Minutes-DRWG-20140103.docx.

GUIDELINE #8

The file name should be clear and concise, yet include sufficiently descriptive information independent of where it is stored:

- 👎 More problematic is a file such as K:\Digitization-Project-XYZ\Generic-Collection\Box216\7843\7843-01.jpg. While this is a very organized way of storing a file, it is only efficient as long as the files stay in its original folder.
- 👍 A more appropriate file name would be K:\Digitization-Project-XYZ\Generic-Collection\Box216\7843\Generic-Collection-Box216-7843-01.jpg.

GUIDELINE #9

Consistency

➢ Be consistent! This will allow the most effective search and retrieval over time

👍 **Do:**

→Minutes-Web-Governance-Committee-20150113.docx
→Minutes-Web-Governance-Committee-20150217.docx
→Minutes-Web-Governance-Committee-20150317.docx

👎 **Don't:**

→Minutes-Web-Gov-Committee-20150113.docx
→Minutes-WebGovernance-20150113.docx
→Minutes-WG-Committee-20150113.docx

GUIDELINE #10

Document Registry Title

- When an item is added to the Document Registry, in general the above guidelines should be observed for the "Document Title" field as it affects how the document will be rendered/sorted in a browsable list. The one key difference would be to uses spaces (and possible commas and colons) instead of hyphens.

👍 **Do:**

→Minutes, Web Governance Committee: 20150113
→Minutes, Web Governance Committee 20150217
→Acronyms are may be used in the title, but should be fully described in the document
→The key here is CONSISTENCY

👎 **Don't:**

→Minutes-Web-Governance-Committee-20150113.docx