INFORMATION MATTERS WITH PLYMOUTH UNIVERSITY

Plymouth University

Information Management Good Practice: Naming files

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1. Introduction

1.1 Purpose of this document

The ability to retrieve information is fundamental to the successful operation of the University, underpinning decision-making, service provision and our capability to meet legal obligations.

Most files are created to share information with others. Hence, naming files clearly and consistently is critical in ensuring that colleagues are able to find information quickly and effectively.

This document outlines guidelines for creating file names that will support easy information identification and retrieval.

1.2 How to use this document

The guidance is aimed at anybody who creates electronic files, especially if they are intended for use by others. The creator of a file has the most complete understanding of its content and purpose. Therefore, **it is the responsibility of the author to apply these guidelines at the point of file creation**.

As the guidance needs to be applicable in many different use cases, the advice given in this document is broad and aims to strike a balance between creating **brief** and **meaningful** file names.

These general guidelines can be used to develop structured rules for large sets of files or special local requirements.

2. Guidelines for creating file names

A. General principles

Usability   This is the most important principle when creating file names. Follow these guidelines to make file names usable:

- Ensure the name is unique, meaningful and understandable to others.
- Maintain consistency to facilitate ordering and readability:
  - Enter **dates** in reverse order as YYYYMMDD, e.g.: *20160521*
  - Enter **person names** as family name first, then initials, e.g.: *SmithEJ*
  - When **numbering** files use a minimum of two digits – including a leading '0' – to enable correct ordering, e.g.: *01, 02, … 09, 10, 11, …*

- Avoid using redundant terms such as '*and*', '*on*', '*of*', unless they really add meaning to the description.
- Avoid obscure abbreviations and acronyms.
- Avoid vague, meaningless terms like '*miscellaneous*', '*general*'. Some frequently used words like '*student*', '*staff*', '*meeting*', or '*University*' may also be meaningless without additional context.

Length
- Keep file names brief to help users quickly identify and retrieve accurate information.
- Keeping names short will also help with character length restrictions in Office 365. Combined library, folder and file names cannot exceed 170 characters.

Order
The **most useful information for retrieving a file should be at the start of the name**.

Consider how files will be retrieved, and therefore arranged – alphabetically, chronologically, or sequentially – as this will affect the decision about what information should be placed at the beginning of the name.

> **Example:**
> - Alphabetical:
>   - Project000158_BusinessCase
>   - Project000158_RiskRegister
>   - Project000158_StakeholderAnalysis
> - Chronological:
>   - 20160721_ CollaborationProjectBoard_Agenda
>   - 20160721_ CollaborationProjectBoard_Minutes
>   - 20160923_ CollaborationProjectBoard_Agenda
> - Sequential:
>   - DataManagementTraining_01_GettingStarted
>   - DataManagementTraining_02_Planning
>   - DataManagementTraining_03_DataSecurity
>   - […]
>   - DataManagementTraining_12_Exercises

Spacing
Avoid using spaces, as they are not recognised by some systems, display badly in URLs and increase the number of overall characters. Replace spaces with capitalised letters to demarcate the words. Underscores (_) and hyphens (-) are also acceptable when they offer additional clarity.

> **Example:** '*Collaboration Project Board'* could be replaced with:
> - CollaborationProjectBoard **(preferred)**
> - Collaboration_Project_Board
> - Collaboration-Project-Board

Characters	Use alphanumeric characters: letters (A to Z, a to z) and numbers (0 to 9)
	Avoid invalid characters. Office 365 does not accept the use of these characters: \ / : * ? " < > | # % { } ~

Name elements	The most commonly used components in constructing a title include:

- Subject
- Date
- Resource type
- Version number
- Creator

However, some of these fields should be omitted dependent on the content and purpose of the file. Specific guidance for each of these elements is given below in section B.

B. File name elements

Subject	The name of the file should be descriptive of its content and purpose, acting as a summary that helps the reader understand what they will find in the file.
	Suitable subjects could be activity, project or meeting name.

Dates	Only use dates in the file name if they are necessary to understand the content, e.g. in the case of recurring events.

> **Example:** '*CollaborationProjectBoard_20160923_Minutes*' refers to the Minutes of the Project Board held on 23rd September 2016, and adding the date will help to differentiate this file from minutes of other Collaboration Project Board meetings.

If you want files to be ordered chronologically, put the date (in reverse order) at the beginning of the name, e.g.: '*20160923_ CollaborationProjectBoard_Minutes*'

Do not include the file creation date in the file name. It is not required, as this information is stored in the document properties.

Resource type	Add the resource type to the file name, only if it provides useful context to understand what is included in the document.

> **Example:**
> - In '*CollaborationProjectBoard_20160721_Minutes*', the resource type '*Minutes*' is a useful piece of information, telling us what the document contains.
> - Adding '*presentation*', to the name of a '*.pptx*' file is not so helpful, as the information is implied in the file extension.

Version   Including the version number in the file name is not recommended as it may result on URLs failing when the file is replaced by a new version.

> **Example:** The URL
> '*http://documents.plymouth.ac.uk/.../Procedures_for_Leavers_**v2.1**.doc*'
> will no longer work when replaced by
> '*http://documents.plymouth.ac.uk/.../Procedures_for_Leavers_**v2.2**.doc*'

Versioning is enabled by default in Office 365 Plymouth University Sites, Temporary Sites and OneDrive for Business. Version numbers are recorded and updated automatically, rendering unnecessary the need to make manual copies of file versions[1].

You can also create a column to show the publishing status of the file e.g. draft, awaiting approval, published and therefore don't need to include this in the title of the file itself.

Creator   Only add the name of the author(s) to the file name if it adds to the description of the content. Otherwise, author(s) should be included in the file properties, not in its file name. If adding 'author' information to the file name, use the job title (in full) and not the person's name.

> **Example:** '*InformationManagementGuide_PlymouthUniversity*' and
> '*InformationManagementGuide_JointInformationSystemsCommittee*' helps to differentiate between two guides that have been published with the same name, but by different professional/educational bodies.

If you have questions or comments about this document, please contact
informationgovernance@plymouth.ac.uk

Document Control			
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0.1	E. Menendez-Alonso (Digital Curator)	Initial draft	14/10/2016
1.0	EMA (Digital Curator)	Published version	18/10/2016
1.1	EMA (Digital Curator) / C. Paxton-Denny (Business Analyst)	Minor amendments. Added 'creator' example.	25/10/2016

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[1] Right-click on a file to access 'Version history'. In PU Sites, file properties – including version – can also be displayed as columns in document libraries. See https://www.plymouth.ac.uk/your-university/about-us/university-structure/service-areas/it-services/collaboration-project-resources for access to Office 365 training and resources.