

File Management: Management

How should I organize the files that I need to keep?

A good file folder structure helps you keep, find, and contextualize materials.

When choosing a folder title, it is important to use a name that accurately describes the documents you will file there (e.g. “travel requests and reimbursements FY 2009/2010”). Try to use consistent spelling and vocabulary that others can interpret if necessary. Avoid using obscure acronyms and abbreviations when possible. Make sure your categories do not overlap.

There are six types of names that you can give your file folders:

Type	Example	Reasons to use
Geographic area or location	Travel Reports > England	Good for subfolders
Numbers or symbols	NF-001	Can be brief, specific, and indexable; however, what they represent may not be apparent immediately
Dates	March 2009	Allows quick deletion of documents after a certain period of time; can be sorted quickly by date and moved into a folder
Subject topics (names, organizations, companies, projects, publications, etc.)	Budgets, Courses/Elem Chinese	Brings together all documents on a particular topic, regardless of subject line; allows flexibility in overcoming erroneous subject lines
Combo of subject/date	Evaluations/Spring 2009	Can take a large subject file and break it down into smaller time-based files
Record series	Annual Reports	Makes retention and deletion of documents identified in records schedules easy

Most people find a multiple-level system of folders and subfolders useful. To the extent possible, folders at a given level should not overlap and they should relate to the nature of documents created and your records retention schedule when possible. For example, your main folder may be Course Evaluations, with subfolders of Course Evaluations Fall 2008, Course Evaluations Spring 2009, etc.

If files are being stored on a shared network server, organization schemes and folder titles should be set up in consultation with system administrators and others accessing the network.

What should I include in a file name?

A file should be named according to its content. It also should include any revision or version dates and author identification if it's a file that has had multiple contributing authors. For example: Annual Report 11_01_09 Jane.

File name and folder structure often can work together to provide the context for a document. For example, a document may be housed within a folder structure such as Applications > 2009 > Jane Doe. While the file name only provides you with the information that the file is about Jane Doe, the structure tells you that the file also is an application from 2009. When sharing or printing this file, it might be a good idea to include the information that the folder structure provides.

Do you have any suggestions for sharing documents and organizing shared file space?

If files are being stored on a shared network server, organization schemes and folder titles should be set up in consultation with system administrators and others accessing the network. All members of your group should agree to standard filing and naming structures.

What's the advantage of adding metadata (filling out the "properties") of a file?

Adding information to the properties field, such as author name and description, can be useful for providing contextual information about the document. This can help the document's creator or users understand the document in the future.