File Management

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

A good file folder structure is a structure that 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 (example: "travel requests and reimbursements FY 2003/2004"). Try to use consistent spelling and vocabulary that others can interpret if they need to. Avoid using obscure acronyms and abbreviations when possible. Check that your categories do not overlap.

There are 6 types of names that you can give your file folders:

Type	Definition / Examples	Reasons to Use
Geographic area or location	Travel reports > England	Good for subfolders
Numbers or Symbols	NF-001	Can be brief, specific, indexable. May not immediately be apparent what they represent.
Dates	March 2004	Allows quick deletion of documents that can be deleted after a certain period of time. Can quickly sort messages by date and move 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 you flexibility in overcoming erroneous subject lines.
Combo - Subject/Date	Evaluations Spring 2002	Can take a large subject file and break it down into smaller time-based files.
Records Series	Annual Reports	Makes retention and delete 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 be overlapping 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 2002, Course

Evaluations Spring 2003, 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 should also include any revision or version dates and author identification if it's a file that has had multiple authors contributing to it. For example: Annual Report 11_01_04 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 > subfolder 2004 > 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 is also an application from 2004. When sharing or printing this file, it might be a good idea to include this 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 for the document. This can help the document's creator or users understand the document in the future.