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NAMING DOCUMENTS FOR BETTER ORGANIZATION

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Catalogue Entry

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Subject	research data management
Description	File systems are easier to navigate if they have been organized according to a convention, as it allows the person browsing to infer information about the files and directories at a glance. This document recommends a convention whereby information such as project, document type and lead author are encoded within the filename, and suggests a method for exposing the document title other than through the filename.
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1. INTRODUCTION

The point of naming something is to be able to recall and refer to it, to distinguish it from other things, and to recognize it when a reference is made to it. Currently digital files are referred to principally using their *File Name*; sometimes – though rarely – this is augmented by using the *Document Title*. The use of both *file name* and *document title* as a matter of habit is encouraged where this is practicable.

This document explains how using both name and title (and other metadata) makes it much easier to manage your documentation; not only are you more likely to be able to tell at a glance what a file contains (now and, more importantly at some point in the future) but it helps others to do so. Further, the intelligent use of multiple naming provides the basis for much more powerful searching using, for example, MS Word Advance Search, desktop search engines, and so on.

It is highly recommended that you adopt some form of (documented) file naming convention for you project or work, as exemplified in Section 2. At the same time it is recommended that you embrace the move toward rehabilitating the use of the document title, as illustrated in Section 3.

2. NAMING YOUR DIGITAL FILES

A sensible file name gives clues to the nature of the stuff contained within and the context in which it was made. In addition, a good file name should convey useful information over an extended time (not just the week after it was coined!).

Here is a suggestion for constructing a file name that provides context information, and should be interpretable long after the event, provided a record is kept of the ‘decode information’ (i.e. something like the illustration below). A slightly different approach is shown in Figure 3. The flavour of file naming convention you use is not important, what is important is that you choose, record and use one.

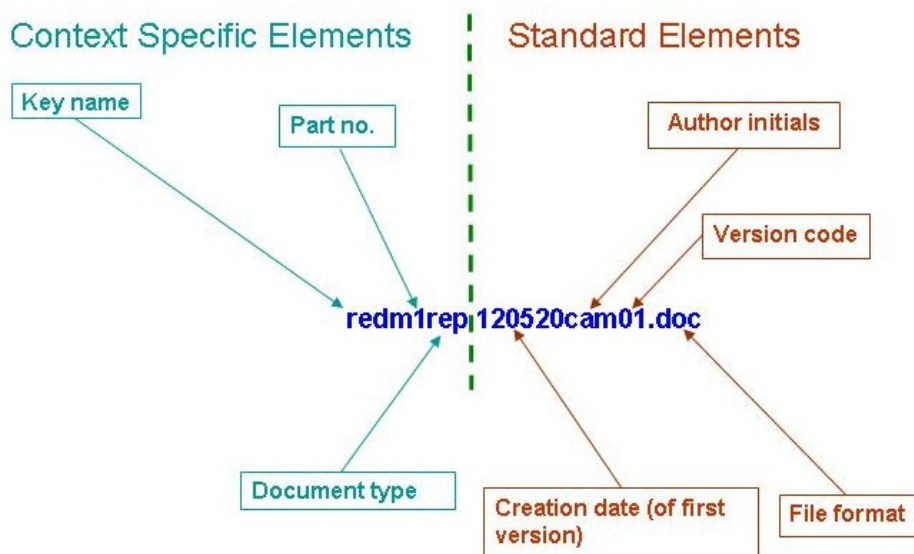


Figure 1. An example set of file name elements

The Elements of the File Name	
Element Name	Description
<i>Context-Specific Element</i>	<i>Elements the number and use of which will vary depending on the situation in which the file name convention is being used</i>
Key Name	Often a project or task (job) name or acronym; might be one of a number of task types.
Part Number	This is a flexible component that can be used or discarded as appropriate. It might refer to a work package number, an experiment or other process number or such like.
Document/file type	This element can be used, for example, to indicate (through appropriate abbreviations) whether a document is a report (rep), meeting minutes (min), an agenda (age), a presentation (pre) and so on. For any given application or creating context a set of document or file types can be selected, agreed and specified.
<i>Standard Element</i>	<i>Elements which have been shown to be useful to retain independent of the situation in which the file name convention is being used</i>
Creation Date	This is just the creation date of the document. It is suggested that the format YYMMDD is used, since it allows automatic date ordering of files.
Author Initials	Self-explanatory; for a group of people it's useful to agree the set of initials to be used.
<i>Version number</i>	This is an extremely powerful element; see below for details
<i>File Format</i>	Usually automatically generated by the creating software.

- Where a document is written collaboratively the initials should be that of the principal author or its 'owner'.
- The version code consists of two numerals, the first being the document version the second indicating the revision. Customarily draft documents are given the draft numbers 00 to 09 (the assumption being that no more than ten drafts are likely to occur). So a file with version number 02 will be the second revision of a file (00 being the first draft). Likewise a file with the number 10 means it is the first, unrevised, completed version; a document bearing the number 11 means that this is the first revision of document 10. Major changes to a document can be indicated by using an integer higher than 1 as thought fit, so a document bearing the number 20 indicates the first major revision.
- Six document types have been used in the past which work well for research projects: report (res); meeting (mee); presentation (pre); poster (pos); research data record (res); miscellaneous (mis) i.e. not being on of the other five types. Terms of this sort can be selected to suit the situation in which the files are being created. In the context of research data management the addition might usefully be made of 'data management plan' (dmp) and 'project record manifest' (prm).

- To identify yourself as having made an amendment to a draft document (for example, when making revisions as a co-author) use the syntax:

redm2rep100123cam10-060312AmendeeIdent.doc

where *AmendeeIdent* is your unique initials. Use the date form YYMMDD to enhance searchability and document listing.

3. REHABILITATING THE DOCUMENT TITLE

Because of the legacy of computer operating systems, which for many years provided little support for document management, it has remained usual for digital files to be identified solely by their file names. Originally restricted to encoding only 8 characters, modern machines allow very long file names to be constructed, which allow full reign to the user's creativity – confusion frequently results! Shown below is the situation as it is often encountered now; the file names attempt to describe the contents of the files using an ad hoc approach. Often, whilst successful in the short term, the names soon become meaningless, even to the originator. They fail entirely to form the basis of easy recall or search, especially to those who have no familiarity with the work.

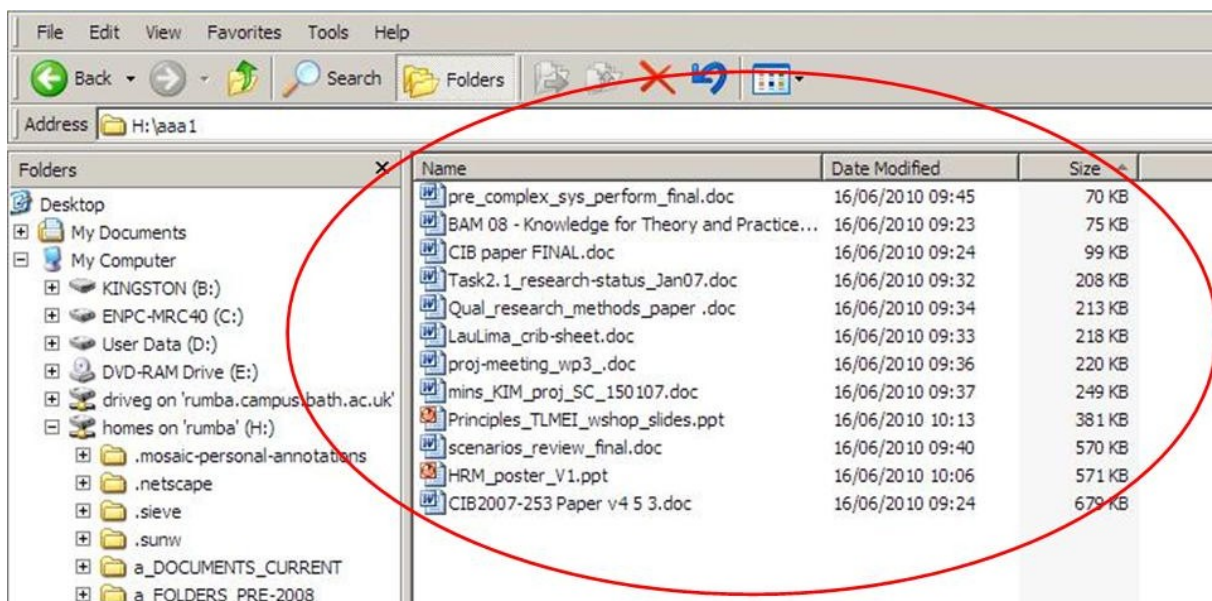


Figure 2. The conventional approach to document management

Compare the approach shown in Figure 2 with that shown below, where a formal means of constructing file names has been adopted.

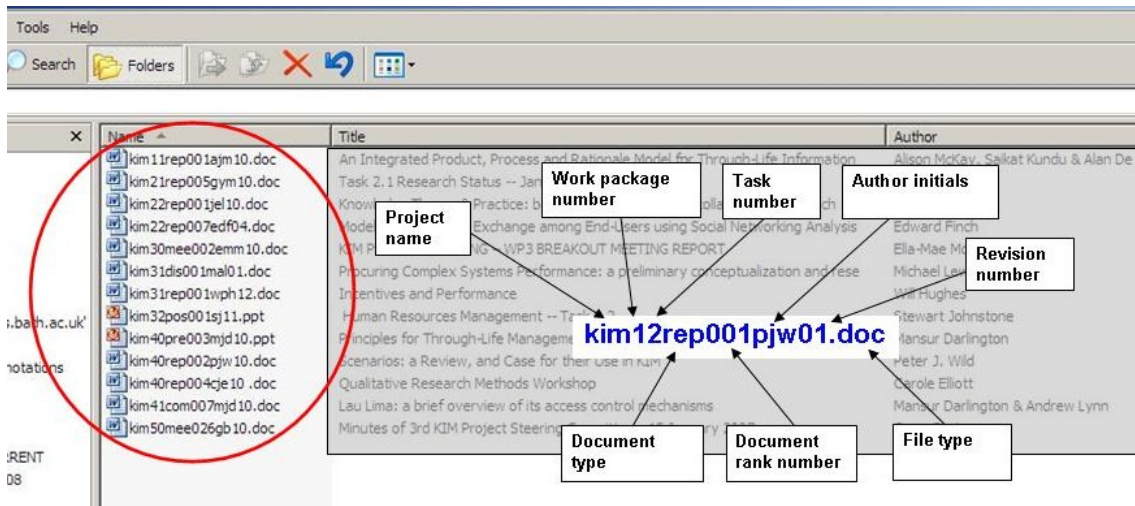


Figure 3. A set of digital files named according to a contextualizing file naming approach

It can be seen here that each file name carries a much greater amount of information, always readily decipherable provided that the document recording the convention is available.

A good file name is one that provides *contextual information* about the file that is described. Once this is done, the *Document Title* can be rehabilitated as the means by which the description of the contents is made.

Many word processing systems, and other file generating applications, provide the means to record file and document metadata. This is exemplified by the provision found throughout Microsoft products of the properties box. Once the details have been entered, it is then possible to display them as exemplified for the title.

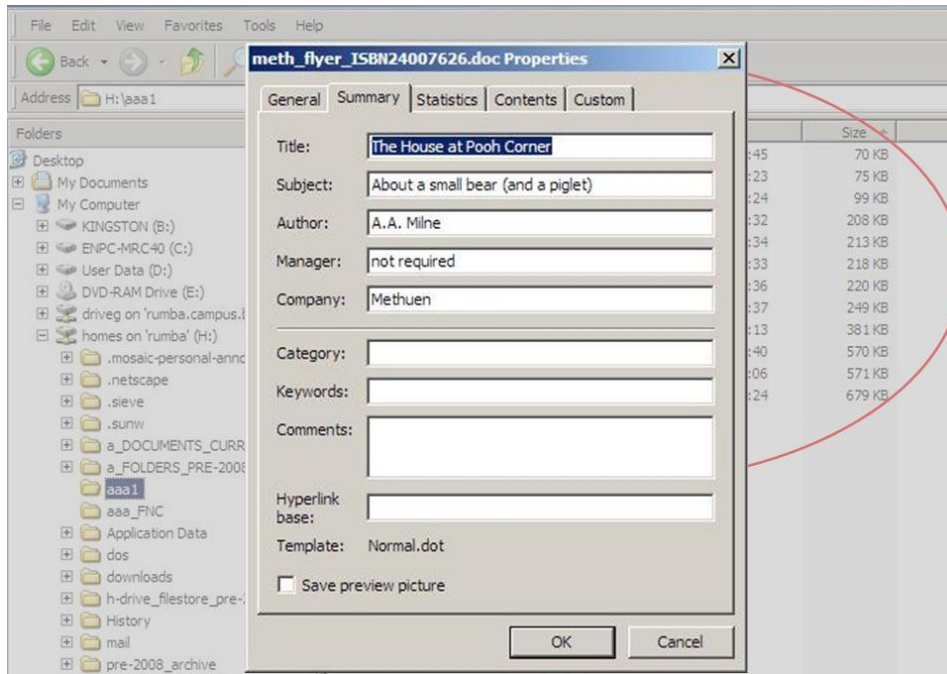


Figure 4. Document properties help describe the file

For those using MS Office and other (sensible) document management facilities, not only can the document title be displayed alongside the file name, but so too can other document properties as appropriate.

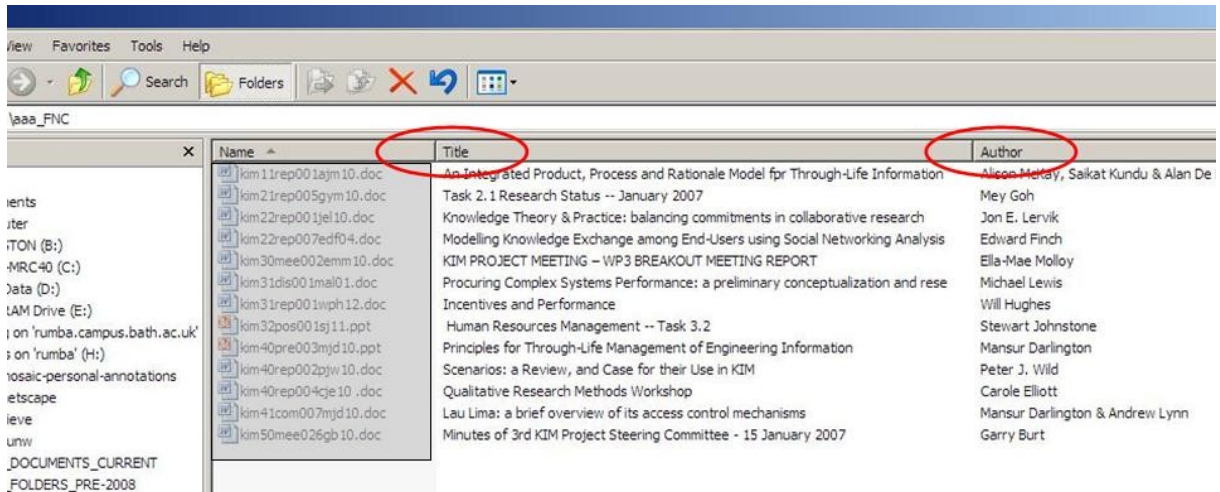


Figure 5. Once captured the document properties, but especially the Title, can be displayed with the file name

Likewise the title and other properties can be used to organize and search for documents stored on a file system.

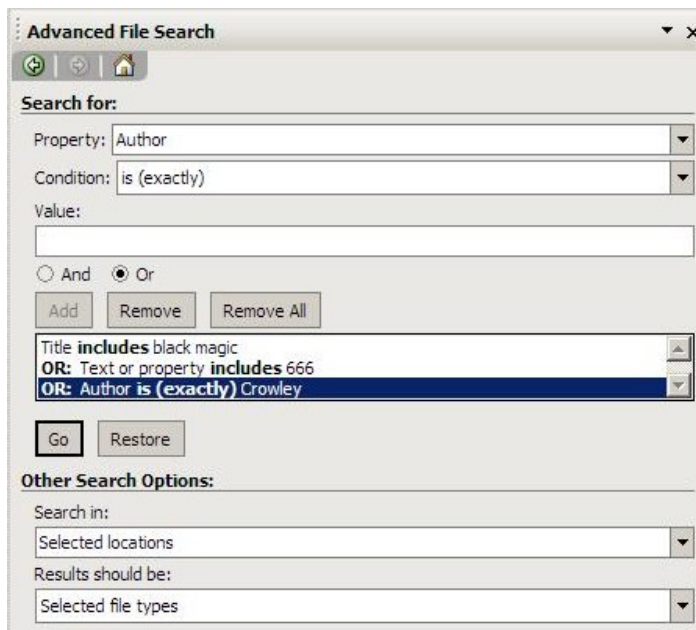


Figure 6. Using MS Word (2003) advanced search facility to construct a search using document properties

In spite of the usefulness of the document title, aspirations toward its rehabilitation are somewhat thwarted at present because many desktop environments provide little or no native support for document title representation, although sometime it is possible to find a plug-in that handles files in a more powerful manner. The developers of such, often open-source, software will no doubt come to our aid eventually.