

February 2014

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# FILE NAMING: BEST PRACTICES

# Next Lunch-n-Learn:

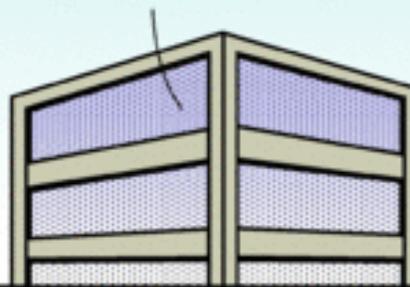
- Friday, March 14:  
Alan Barnett, “Records Appraisal”

THE COMMITTEE  
DECIDED THAT THE FILE  
NAMING CONVENTION  
WILL START WITH THE  
DATE, IN THE ORDER OF  
MONTH, YEAR, DAY...



Dilbert.com DilbertCartoonist@gmail.com

... THEN A SPACE,  
THEN THE TEMPERATURE  
AT THE AIRPORT, AND  
THE HAT SIZE OF THE  
NEAREST SQUIRREL.



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TO BE PERFECTLY  
HONEST, IT WAS A  
LONG MEETING AND  
WE PROBABLY DIDN'T  
DO OUR BEST WORK  
TOWARD THE END.



# Agenda

- ⦿ Why It Matters
- ⦿ Which Files to Name
- ⦿ Best Practices
  - Considerations
  - Content / Content Format
  - Number of Characters
  - Letter Case
  - Special Characters
  - Spaces
- ⦿ Other Considerations
- ⦿ Help
- ⦿ Questions

# Why It Matters

Have a consistent naming standard to:

- ⦿ find files when you need them
- ⦿ eliminate file duplication
- ⦿ reduce the likelihood of writing over files
- ⦿ allow others to access files left by former employees

# Which Files to Name

Apply a standard naming convention to:

- files on a shared drive
- files in a digital repository / publicly accessible files
- other files on your work computer
- folders / folder structures

# Best Practices: Considerations

- ⦿ Who will be accessing the file?
  - computer – can be coded
  - human – should be readable
- ⦿ How does the file correspond to the other files in the directory?
- ⦿ What is the file used for?
- ⦿ What are key components or defining elements of the file?

# Best Practices: Content

- department / institution
- organization / agency
- project
- publication
- collection
- category
- sequence
- series
- box
- folder
- reel
- frame
- accession
- title
- purpose
- format
- author
- version
- volume
- issue
- page
- date
- object ID
- audience (employees, public)
- derivative (thumbnail, for print, for screen)
- location

# Best Practices: Content Format

- ◎ date: YYYYMMDD or YYMMDD
- ◎ pad with leading zeroes: 001 instead of 1
- ◎ use codes
  - v for volume or version
  - i for issue
  - acronyms for institutions
  - t – thumbnail copy, s – screen copy, p – print copy
  - see University of Illinois, Urbana-Champaign for more examples

# Best Practices: Content

## Utah State Archives

- series number (5 digits)
- box number (3)
- folder number (3)
- document number (3)
- underscore
- page number (3)
- series 85039
- box 1 → 001
- folder 2 → 002
- document 1 → 001
- page 1 → 001

● 85039001002001\_001.tif

# Best Practices: Content

University of Illinois, Urbana-Champaign

● *Building Your Digital Collection* by  
Renée Wilson, published 2014

- author surname (3 digits) ● Wilson → wil
- author first name (3) ● Renée → ren
- date of publication (4) ● 2014
- first word of title (3) ● Building → bui
- second word of title (3) ● Your → you
- wilren2014buiyou.epub

# Best Practices: Content

## Stanford

- project name / acronym
  - location
  - date
  - type of data
  - version number of file
  - extension
  - building plans
  - Orem
  - 2010-2012
  - blueprints
  - 3
  - pdf
- buildingplans\_orem\_2010-2012\_blueprints\_003.pdf

# Best Practices: Content

## State Library of North Carolina

- type of document
- author
- purpose
- date
- video
- Wilson
- filename training
- February 21, 2014
- video\_wilson\_filenameetraining\_20140221.mp4

# Best Practices: Content

## Exadox

- ⦿ Go from general to more specific
  - agency\_department\_project\_purpose\_date
  - project\_volume\_issue\_date\_page
  - division\_corporation\_project\_date
  - etc.

# Best Practices: Number of Characters

- ◎ 21-32 characters is standard
  - `how_many_characters_is_thirtytwo`
  - `it_started_with_a_chance_meeting`
  - `this_isnt_a_good_name_for_a_file`
  - `what_makes_for_the_best_filename`
  - `u_killed_my_father_prepare_2_die`
- ◎ total path: 270 characters

# Best Practices: Letter Case

- ⦿ Lowercase is standard
- ⦿ Uppercase can be used to distinguish words in a filename
  - FileNameUsingUppercase
- ⦿ If you use both upper- and lowercase, make other distinctions in filename besides just the case

# Best Practices: Special Characters

Don't use the following:

- ◎ : / \
  - used as directory separators
- ◎ ¢ ™ \$ ®
  - not supported by all file/operating systems
- ◎ . , [ ] { } ( ) ! ; “ ” ‘ \* ? < > |
  - reserved for special uses in programming
- ◎ Underscore \_ and hyphen - are okay

# Best Practices: Spaces

Use instead of spaces:

- ◎ underscore (most common)
  - 140220\_filename\_best\_practices\_notes
- ◎ hyphens
  - 140220-filename-best-practices-notes
- ◎ caps
  - 140220FilenameBestPracticesNotes
- ◎ nothing
  - 140220filenamebestpracticesnotes

# Best Practices: Pick a System

- The #1 most important thing to remember:  
Pick a system and stick with it.
- Write it down
- Keep a copy of standards on each drive

# Other Considerations

- ⦿ Filenames are not adequate metadata
  - Keep metadata stored as separate files
- ⦿ Think long-term: what will you remember about this file in 5 years?
- ⦿ Check before you start changing existing file names!
  - Files may be co-dependent, and changed names would break the link

# Help!

## What to do now?

- ◎ Start where you are
  - Name new files according to the standards
  - Convert old files as they are used
- ◎ Change file names in batches with special software:

Bulk Rename Utility	<a href="#">link</a>	PC	free
File Renamer Basic	<a href="#">link</a>	PC	free
Better File Rename	<a href="#">link</a>	PC	free trial
Métamorphose: A File -n- Folder Renamer	<a href="#">link</a>	PC, Mac, Linux	free
Renamer 4	<a href="#">link</a>	Mac	free trial
A Better Finder Rename	<a href="#">link</a>	Mac	free trial

# References

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