

The simple and affordable option

Information assets essentially include all electronic files and paper documents within the organization. These are valuable assets/resources because they are intrinsically tied to daily operations. It is therefore extremely important to ensure that they are easily retrievable at all times by all stakeholders that must rely on them. Many enterprises invest an enormous amount of time and money to render their electronic information assets retrievable. Unfortunately, the results can quite often be rather disappointing relative to the investment and effort. An affordable and effective option is to simply employ structured folder/file naming conventions for each business activity in the enterprise as a means of managing the applicable electronic information assets. This can be used either as a complementary or alternative strategy depending on the situation on hand.

Electronic and paper Information asset mix

Before getting into the details of employing a naming strategy to help manage information assets, let's get a clearer picture of what they constitute. Electronic information assets predominately consist of office files (e.g. Microsoft Office Word, Excel and PowerPoint), emails and attachments, graphic files, images and digital documents i.e. generally PDFs and sometimes TIFs. PDFs have slowly become the undisputable digital substitute for paper as organizations strive toward the somewhat illusive paperless office. There has been notable progress but most offices continue to be rather "paperful" and in many cases paper still represents the majority of the information assets in the more conservative enterprises.

Transforming paper assets

Although, many justify their reliance on paper, partly because they feel that it is more tactile or ergonomic and that you can not apply a wet signature to a digital document, nevertheless, paper is a costly asset to maintain. Even if one is unfazed by the enormous carbon foot-print and costs associated with paper, one can not disregard the ensuing costs from the minute one decides to inject it into the internal workflow process and/or just file it. The inherent cost of working and managing paper files should be and can be easily avoided in this day and age where document scanning is so affordable. The key is to find where in your paper process it would be optimal to transform your paper into digital documents. Once in a digital state, it is possible and imperative that the file be named and saved properly employing a structured file naming convention strategy to ensure easy and precise retrieval. The consequences of not diligently doing so can be more costly than continuing the paper process.

File retrieval fundamentals

If you name your file properly and you store it properly as per a prescribe policy or convention, you and all your coworkers will be able to easily retrieve it. This is the fundamental principle behind a structured file naming and storage strategy. The concept requires that a file/folder structured naming convention be instituted for each business activity and that all stakeholders adhere to it consistently to properly name and store operation-critical files. If the policy is executed with diligence, it would be possible to retrieve files efficiently and with a precision that is directly proportional to the input quality of the structured file names assigned.

Structured file naming anatomy

Structured file naming is the combining of multiple information elements separated by delimiters (e.g. underscore "_") to compose a unique information-rich file name. Structured file naming is like a bridge that is designed to encourage collaboration through file sharing. Just like a bridge, if the file naming structure design is sound, it will easily support the load of the information assets and the individuals that rely on them, whether these individuals are sitting in the same cubicle or half way around the world. This is made possible from the instant a file naming and storage structure is put into effect as a working policy.

Continuing on the bridge theme, let's look at how a hypothetical bridge maintenance contractor would structure their file names. The illustration that follows provides a basic example of structured file naming.

Illustration: Structured file naming for a bridge maintenance contractor

Project	Activity	Doc Type	Description	Version	Ext
GGBRIDGE	PAINT	QUO	Free Text	N	pdf
JCARTIER	PRIME	LTR		A	doc
VICTORIA	WELD	INV		N-N	xls
BROOKLYN	REPAIR	PO		A- N	ppt
HUMBER	RESURFACE	REP		A-A	dwg
	SAND-BLAST	SPEC			jpg

Examples of resulting file names:

GGBRIDGE_PAINT_QUO_RAILINGS_V01.pdf
 GGBRIDGE_WELD_SPEC_RIVETS- 500_V1-02.dwg

Structured file naming rules

The strength of a folder/file naming convention is dependent on the proposed naming structure and the quality and quantity of the data elements chosen to build it. For any business activity there is always an optimal structure. However, any structured naming convention that attempts to be all encompassing may result in overkill. The key is that the resulting file name is sufficiently comprehensive, familiar and easily interpretable by all involved. What are the recommend rules for best practice in file/folder naming? The following is a listing of 10 basic rules that may be used as a general guideline for creating a structured naming convention.

1. Use short and simple folder names and folder structures.
2. Put just the right amount of elements in the structure for easy retrieval and identification.
3. Use the underscore (_) as element delimiter.
4. Use the hyphen (-) to delimit words within an element or capitalize the first letter of each word.
5. Elements should be ordered from general to specific detail of importance as much as possible.
6. Dates should be ordered: YEAR, MONTH, DAY. (e.g. YYYYMMDD, YYYYMMDD, YYYYMM).
7. Personal names within an element should have family name first followed by first names or initials.
8. Abbreviate the content of elements whenever possible.
9. Version control should start with V followed by at least 2 digits if more than 9 revisions are anticipated.
10. Prefix the names of the pertinent sub-folders to the file name of files that are being shared via email.

For detailed explanations and examples of these rules, please refer to the article: **Folder and File Name Conventions – 10 Rules for Best Practice** available on the www.exadox.com website.

The benefits

Once a structured naming convention is in force, everyone will be able to notice a remarkable improvement in operational efficiency and productivity resulting from the simple and precise: search, identification and retrieval of files. Collaboration will be facilitated through more manageable file sharing. If version control is included in the structure, duplication of files and confusion will also be drastically reduced.

Some challenges

The strategy is simple; however, nothing will happen without the proper leadership to drive it. The goals, the strategy and the plan must be communicated to all stakeholders. The rules of engagement, namely, the adherence to the policy needs to be followed for everyone to realize the benefits. Some vigilance is essential to ensure consistency and accuracy in the naming process. If the strategy is widely adopted it would be worthwhile looking into a semi-automated structured file naming solution. For more details on an automated approach please refer to: **eXadox White Paper: Semi-Automated Structured File Naming and Storage** or visit www.exadox.com.

About the author: Vincent Santaguida is the founder of MultiCIM Technologies Inc. (1986), a software engineering and business process automation company. He is major proponent of paperless office practices and the use of structured folder/file naming conventions as a simple affordable means of managing documents and files. He has been actively promoting these concepts through article publication and speaking engagements.