



Your Point

## Streamline the information flow in your organization at no cost, just with some thought-out discipline

Most modern organizations are about information and information exchange. Even if their core business is something completely different, e.g. manufacturing, it is still information and the exchange of it that underpins the whole operation.

Every organization has the technology to share information almost instantaneously. And while those computers and networks have helped a lot, oddly enough important information is often not readily available. We have to call people to ask to send us a document, we inadvertently work with outdated data or crucial files are on a private disk of someone who happens to be on a holiday. How can we make that data really flow, so that information is available where and when we need it?

Easy: with some simple measures, a bit of free software, and discipline whenever you save a document, spreadsheet or other piece of information. I'll tell you how.

### Use a standardized file name convention, and stick to it

I wish I got a dime for every document out there that is called 'Doc1' or 'Document1'. Not a very helpful name, everyone will agree. To make information quickly retrievable, a meaningful file name is imperative. Question is, what is meaningful?

### Start with a description that unveils the contents

Recently I received a document called 'Human Resources'. Now what might be in that? Let your imagination run wild! After a short look, I changed it to 'Acme Corp HR Dept Organization Chart'. Difficult? Just step into someone else's shoes and imagine whether he or she can easily guess the exact contents just by looking at the file name. It is as simple as that. Don't be shy: modern computer systems allow for long file names. It is better to have a long meaningful name than a short unhelpful one.

### Add the date in YYMMDD-format

Then, add the date. True, computers keep track of the date too. But that is not necessarily the date of the last change. Someone might just look at the file and save it without changes - there goes your file-date system.

Add the date in a numeric YYMMDD-format, like 090807 (or 09-08-07) for August 7, 2009. That way, files wind up in the right order. (With a MMDDYY format, May 14, 2014 sorts after May 13, 2015 but before May 15, 2012. Hmmm. Not very helpful. Let alone the DDMMYY format where 14 May fits in nicely between 13 June and 15 June... No good.)



## Add a version number

Like software, you could also add a sub number to distinguish main revisions from small ones. 'V1s8' (version 1, sub 8) for instance, or 'V3s2' (version 3, sub 2). There is some redundancy with the date, but then again, this gives more information about the history of the document and allows for intraday versions. When a document is finished ('Vdef'), earlier versions may be deleted when a trail is not needed.

## Add the author - coded

The first four letters of the last name plus one or two initials is almost always enough for a unique identification, even in large companies. So in my case, it would be KNIPJ (because my organization is small, JK suffices). Where it is not, you can add an extra letter. So John Anthony Smith and Jim Arthur Smite might end up as SMITJAA and SMITJAB. Capitals can act as an extra identifier for search routines, but if your preference is SmitJAa, go ahead.

Leave the author code out with general documents where the author is of no importance.

## Add other file name elements you need

Depending on the kind of organization you are in, there may be more elements needed (e.g. order numbers, department or client codes); add them to your file name liberally. In the end, the filename has to be as meaningful as possible for you and your organization.

## Special characters separate fields or add uniqueness

If needed, a separator character can add to the legibility of your file name. An extra hyphen (-) or number sign (#) can also help making a certain part of your file name unique. For instance, when your company happens to use 6-digit codes that you may use in your description, '-YYMMDD' helps to make the date uniquely retrievable.

Depending on their operating system, computer do not allow you to use certain characters in file names. These are: / (slash), \ (backslash), ? (question mark), \* (asterisk), : (colon), | (vertical bar), " (quotation mark), < (less than), > (greater than), . (period, allowed but better not employed it as it is commonly used as the extension separator). Spaces are normally allowed as long as they are not the last character of a file name.

## Pick the elements, decide on an order and roll your own convention

gd op	Grootte	Naam
2006 20:42	56 kB	- OEF Boxplan M
2006 16:38	46 kB	- OEF Boxplan O
2006 12:17	1.433 kB	- OEF Origineel C
2006 16:59	1.429 kB	- OEF Uitwerking
2006 22:54	46 kB	- PDC deelnemer

Then, pick the elements you need, and decide on an order. Since computers easily sort (counter-)alphabetically (just click on the column header you wish to sort, ▲ and ▼ show the sort order), put meaningful name elements first. In a process driven organization that might be the date and author, in a group of professionals the author code, and it's

the client code in organizations where most documents are about clients (e.g. auditors, and they will want to add the fiscal year to the client code).



Some examples of meaningful file name elements and orders:

140403 KNIPJ Some Meaningful Description V3s8

HRM Another Meaningful Description V2s4 #KNIPJ -14-07-06

Acme07Q1 Pension Fund Report Vdef -140430 -KnipJ

KNIPJ Proposal secondary benefits package 2015-2016 V4s5 140305.

## Produce hand outs for everyone involved

Make a handy card that spells out the file name convention and gives examples. Laminate it, print it on an adhesive label, hand out photo frames, anything to hammer home that each file name has to be meaningful. No exceptions. Make your people realize: this is a major step to professionalize your organization and to make valuable (and costly!) information accessible. Check regularly if everybody sticks to it. Ask your IT-department if they can produce a tool that checks the file name convention for you.

## Get your IT-department to help with a handy macro

In most office suites you can program a macro so that on saving the file for the first time, the program comes up with a file name suggestion that already has all the standard elements (such as date, author and department code, version) in the right order and the cursor in the right place to put in your description. It'll take an experienced programmer not much time. This helps enormously to stick to the file name convention.

## Rename a document when you send it out

When you send a document out to someone, make the file name meaningful to the receiver. For you, 'Acme proposal 150706 -KNIPJ' might be handy. For Acme however, who might receive ten proposals, 'YourName proposal Management Training Acme 2015' is way more useful. Or stick to their file name convention if you know they have one.

Ever downloaded a pdf from a web site? More often than not, the file name is cryptic as can be, e.g. numbers or a illegible code. When you download, rename the file to fit your file name structure. And if you put documents on your own web site, name them well.

## Set up a meaningful directory structure

With meaningful file names and a search routine, you'll find the information you need fast. But even then, a well thought out file structure is very helpful. For clarity, and also for authorization purposes (authorization per directory is possible).

Ideally, directory names have to be collectively exhaustive (so that all files find a place) and mutually exclusive (so that there is no ambiguity in which directory the file belongs). For that, you need a decomposition of your organization or your activities (but not of both at the same time!). On the highest level of the directory hierarchy, make a choice. You could follow the organization chart of your company, but you can also base the structure on a decomposition of organizational functions (as provided by standardization institutes or as seen in management books).



## Use a central file repository, web accessible, or use the cloud

Large organizations always have central file repositories ('network drive'). Thing is, that use of it is not mandatory, so important information winds up on local hard disks, inaccessible for those who need it. Saving files on a local disk, even ad interim, has to be discouraged.

Making the network drive web accessible (or, for smaller organizations, using cloud based storage) is a major step to having the information needed at your finger tips any time any place. A good authorization procedure is crucial in managing who gets access to what. Secure log in procedures are available, some even with a unique multi-digit pass (that changes every 60 seconds or so) that is issued by or derived from a small fob or keychain device.

There is an abundance of cheap/free cloud space. Also, stand alone web enabled file servers (FTP) are available at low cost. If needed, encrypt files to strengthen security.

### Stop using Outlook as a file manager

Most people use Outlook or another e-mail client to share files, even within an organization. That is not a good practice for a lot of reasons. I name just two.

Outlook stores messages and attachments in one big file. Now imagine this file getting corrupted... yikes! So you have to get every attachment out of there by clicking 'file - save as'. But do you really do that?

Also, files reside somewhere inside an e-mail client, unapproachable by other people. From the viewpoint of the organization, that information is lost.

A better business practice would be to save the file on the network drive / in the cloud and share the link (not the file itself) in your mail message.

## Use search tools to find information even quicker

With the file name convention in place, Apple Finder and the standard Windows search (Windows key-F) now let you easily find the files you need. Wildcards as \* (stands for any number of characters) and ? (stands for one character) help you in your search (e.g. the search for \*knipj\*-1505\* finds all files that are produced by me in May 2015, the search for \*knipj\*-1?05\*.pdf reveals all pdf files produced by me in any month of May in this decade). No doubt, Linux has a similar function.

Better search tools are to be had; these index the files on your hard disk or network so you can even perform a search on the contents, blazingly fast. Together with meaningful file names, these tools unlock the information in your department or organization.

About the author: Jos Knippen (co-founder of [Your Point](#), the effect of clear thinking) trains business professionals to think and write clearly and effectively, based on decades of experience as a business copywriter. A file name convention allows him to keep track of all his writings. Roel Peels, an interim IT-manager interested in organizational excellence, provided many of the ideas. He has repeatedly demonstrated the impact of a file name convention on information flow in large organizations.