

Online File Management: Tips for Maximizing Convenience and Minimizing Data Loss — 5 June 2004

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Contents of this handout

Why is file management important?	2
What does good file management consist of?	2
Where to save files.....	2
<i>Use the folder hierarchy to advantage</i>	2
<i>Avoid “canned” folders</i>	2
<i>Keep the hierarchy “flat”</i>	3
How to name folders and files	3
<i>Use the sort sequence</i>	3
<i>Examples</i>	5
Good practices and sensible precautions	6

A note

I've always worked in a PC/DOS environment. Although I've seen Macs in use, I've never worked on one for any sustained period. Also, because of early name limitations in DOS (8-character names; 3-character extensions) and because of my experience with system crashes, I'm hugely conscious of keeping files names short but meaningful. I recommend retaining those habits, even with modern operating systems.

Why is file management important?

In the electronic medium, good file management is the only way to minimize time and frustration—and to stay sane when your client asks for a copy of “that article on ----- that you edited for me two years ago.”

What does good file management consist of?

Good file management includes

- Careful structuring of the folder hierarchy
- Thoughtful naming of folders and files
- Careful treatment of incoming and resident files

Where to save files

USE THE FOLDER HIERARCHY TO ADVANTAGE

First, determine your purpose in saving files. For example:

- Program files
 - Software
 - Related data files
- Business files
 - Administration
 - Projects
- Other professional files
 - Professional organizations
 - Networking (contacts, saved e-mail)
- Personal files
 - Personal financial records
 - Family correspondence
 - Pictures, music

AVOID “CANNED” FOLDERS

- Do not keep critical files in Microsoft-defined folders (My Documents, My Music, and so on). These standard folders are often the prime targets of malicious hackers.
- Try to avoid saving software in the Program Files folder (unless a product’s installation routine gives you no choice). Most programs create subfolders in their main folder, and a “flatter” folder structure (“path” to the file) is always a good idea.

KEEP THE HIERARCHY “FLAT”

Use subfolders as required to categorize main subject areas, but keep the hierarchy as “flat” as possible.

- Plan for 3–4 levels, except in extraordinary circumstances.
 - o If the full name of a file (with its folder hierarchy) exceeds about 256 characters, the file will become irretrievable, or the program will fail to run or will generate errors.
- Always be prepared to reorganize.
 - o Don’t lock yourself into a particular arrangement by hard-coding folder names into programs (some exceptions to be noted later).

How to name folders and files

Make file names a time-management tool. Leverage the sort sequence by using numbering, dates, and initials in file names and by creating “grouping” prefixes and suffixes.

USE THE SORT SEQUENCE

You can sort in a variety of ways in Windows—by name, by “modified” date, by size, and ascending or descending in any of those categories—but sorting by name is most common, so use the sort sequence to advantage.

- The sort sequence starts with special characters.
 - o You can use any special character in a file name, except for these:
/ \ : + ? " < > |
 - o Just for interest, here’s the sort sequence of the special characters across the top of the keyboard:
! # \$ % & () @ ^ = -
 - o But it’s really best to avoid using special characters in file/folder names, if possible.

- Numbers (digits) come next in the sort sequence. Using digits in planned patterns (numeric sequence, all-digit date sequence) gives the best tracking control.
 - o If you use a date sequence, prefer SI date format:
 20040416
 2004-04-16
 This format will sort in date order.
 - o If you use a numeric sequence, use leading zeros to avoid sort errors:

001	1
002	11
003	12
004	...
005	2
006	20
...	...
040	40

 (This was a major problem with Windows pre-XP; however, Windows XP seems to sort properly without needing the leading zeros. However, retaining the habit of using leading zeros makes files lists neater and easier to read.)
- Alphabetic characters (A–Z) come last in the sequence.
 - o With leading digits to control the sort sequence, alphabetic can then be used to clearly identify a file or folder.
 - o In some situations, alphabetic prefixes can take the place of digits for useful sorting of files in a folder.
 - o Keep the number of characters under control, because you want to avoid running into the 256-character file name limit. Develop and use short forms that make sense in your work environment.
 - o For tracking multiple drafts of documents that need to be reviewed by several people, use a combination of numbers (for the drafts) and initials appended to review files (for tracking reviewer comments).
 - o Whatever you do, choose a system and stick by it. “Natural” alphabetic names are nice, but as they multiply in number in a folder, they become impossible to manage well.

EXAMPLES

Major folders for a business might look like this:

- 10 Corporation
- 20 Projects
- 30 Networking
- 50 Personal
- 70 EAC

In a Projects folder, group work into folders by client or by client publication, placing the people from whom you get the most work at the top (so that those folders appear at the top wherever you open the folder):

- 10 Number1Client
- 20 NextBestClient
- 30 OkayClient Pub1
- 31 OkayClient Pub2
- 32 OkayClient Pub3

Within individual client folders, these subfolders are always useful:

- 00 Admin
(project log, correspondence, originals of style sheets and other instructions received from the client)
- 00 Boilerplate
(holds reusable text and annotated style sheets)
- 01 Name —> 99 Name (or similar)

If you are working your way through a group of folders, and you want to keep the folders that you haven't yet dealt with near the top, then you can add a character in front of the sort number. Folders with the added character sort to the bottom of the list, and will appear further down any dialog window. For example:

- 05 Name5
- 06 Name6
- 07 Name7
- x01 Name1
- x02 Name2
- x03 Name3
- x04 Name4

A magazine-type project (files):

- Col-AskAVet
- Col-BestBuys
- Col-DearPolly
- Col-ZooNotes
- Fea-NewPandas
- Fea-TestDiets
- Misc-Ad1
- Misc-Ad2
- Misc-ToC

A medical journal (folders):

- 000 FrontMatter
- 001 Pagé
- 002 McLean
- 003 Gross
- 004 Stanley

Good practices and sensible precautions

Always preserve the original of a file. This particularly holds true with MS Word files or any file that you're going to convert.

- Save without opening:
 - o When you receive an attachment or disk (virus-checked, right?), copy it into your project folder twice, *working at the operating system level*. (That is, do not *open* any file for the initial save.)
 - o Place one copy in an "Originals" folder, or rename this first copy with the keyword "orig".
 - o Place the second copy in your working folder, and give it your planned tracking name.
- Open only "tracking" copies of the file in the relevant software program.
- Be aware of the effects of missing fonts and print drivers.

Group application files with work files for easier back-ups:

- Relocate templates, custom dictionaries, and the like into your projects folder if possible.
- Create a personal software download folder.

Avoid long names and special characters. Windows has a hard-coded limit (about 252 characters) on file identifiers. (A file identifier is the file's full name, including location in folder structure.) For example:

- C:\10 Projects\10 GoodClient\05 MainProject\...
 \20040416 ReportDraft7 AFB

If you use a deep folder hierarchy and long names, you may well run up against the limit. Windows will let you save the file under the specified name, but if you try to open it again, you get a “File not found” error owing to truncation of the full file identifier. (Bye-bye file ...)

Make the first six characters the principal means of identifying the file.

- If you should have a major disk problem, your only means of saving work may involve copying files from your hard disk to another disk in DOS. In that case, you don't want to have to look for the one file you need in a list that looks something like this:

PROJEC~1

PROJEC~2

PROJEC~3

PROJEC~4

PROJEC~5

because you saved your files with names like these:

Project for Ron - Chapter 1

Project for Ron - Chapter 1 second draft

Project for Ron - Chapter 1 with Ron's revisions

Project for Ron - Chapter 5 layout

Project for Ron - Chapter 10 finished

(Holds true for Windows systems pre-XP. Windows XP appears to show full file names at the command line prompt.)

Your notes