
File naming and document properties

Contents

1	Naming and describing documents	1
2	Ensuring documents are described correctly.....	1
3	Guidance on specific document properties	2
3.1	File name/ Name	2
3.2	Title/Full title.....	3
3.3	Keywords/ Tags	3
3.4	Author/Creator	4
4	Images and AV files	4
5	Quick reference	4

1 Naming and describing documents

Make sure your documents are described fully: as well as giving the document a reasonable **filename**, fill in the **title** and **keywords** in the document properties. (In MS Word, these are found under **File** → **Info**). You should also ensure the **author** is correct.

Doing this makes it easier to find relevant documents, and to use them – when you have found a document that looks relevant, you can check, for example, who created it.

2 Ensuring documents are described correctly

If you reuse a document (Using copy and paste, or save as) then you should update the properties so they are relevant to your new document, especially if you are going to publish it to an intranet or internet site.

Making the document properties appear whenever you open a document will help you remember to do this.

Open a word document and select the “developer” tab. Click **document panel** and tick the box next to “**always show document information panel on document open and initial save**”. If you use this document as a template, or copy other documents from it, this option will remain selected in your new documents.

You can also display the document properties in the text of the document, so when you update the properties, this will update the document text. This is really helpful if you

reuse lots of documents – as you proof-read them, you are likely to update the properties as you see inaccuracies in the text.

Take a look at the “inserting document properties” section of the MS Word guidance <http://intranet.open.ac.uk/aps-sites/human-resources/hrd/pics/d139019.pdf> . NB you can insert properties anywhere in a document, they don't have to be in headers or footers.

If you open a document that has already been saved in a SharePoint Library, or create a new document from within a SharePoint Library, then the columns from the Library will be available alongside the standard properties.

3 Guidance on specific document properties

3.1 File name/ Name

Consistent file names allow documents to be sorted alphabetically in order. You should decide with your colleagues how documents in a folder should be organised, and therefore which element of the name should come first: e.g.

<date><subject><document type> or <project name><document type><date>

- Names should relate to the business activity the document supports
- Avoid including personal names
- Avoid terms such as miscellaneous, general
- If the date is included, use it in the form YYYY-MM-DD
- Give enough detail in names so you can identify them out of context, but try not to repeat too much information from parent folder names. Names are part of file paths, which can generally only be 255 characters long before the documents won't open
- Avoid acronyms if possible. If they are too long to spell out in the name, then ensure they are spelt out elsewhere: in the parent folder, in the properties, or in the text of the document
- Use the same words as your colleagues to describe the same things– standard terminology really helps when browsing or searching for information.
- Avoid abbreviating words, or running them together without spaces– this makes them less intelligible to others
- Avoid the following characters: ~ # % & * { } \ : < > ? / | "

If the document will be put on an internet or intranet site, or is stored in SharePoint, then hyphens should be used between words instead of spaces. (This avoids the space being replaced with %20 in the document hyperlink.) There is no need to use hyphens otherwise, and underscores should be avoided.

Shared Drive specifics:

- Include version and draft/ final information, where relevant. NB SharePoint and Documentum number versions automatically in their metadata, so you don't need to include version numbers in the name.

SharePoint specifics:

- Remember that if you change the name of the document, the url will also change, and any existing shortcuts made to that document will break. The version history will also stop, as the name is the basis for the versioning.
- You can change the columns displayed in Libraries to show **Title** as well as (or instead of) **Name**, and in any order
- As you can choose to display **titles** in SharePoint rather than **names**, you may choose to have a short **name**, and a longer, more descriptive **title**.

3.2 Title/Full title

- Ensure the Title field contains a full and objective title for the document.
- Make sure you fill this in for any documents that will go onto websites, and any SharePoint documents. The **title** shows up in the results of a web search, rather than the **name**.
- Spell out any acronyms from the **name** in the **title**
- Titles should contain spaces rather than hyphens
- Use the guidance given for **names** above. You may decide that the **name** and **title** should be the same, or that the **title** should be a longer, more descriptive version of the **name**.

3.3 Keywords/ Tags

Keywords, or **tags**, are important as they help people to find the documents they are looking for. Ideally you should distinguish your document from other similar documents by thinking about how people are going to search for it, and using appropriate keywords.

- Think about the words people might use to search for documents you create, and add them to the keywords. Include the full text of acronyms, and any codes or IDs that describe the document.
- Choose different words from those in the **title** and main text.
- Use synonyms. For example, people might search for Personnel instead of Human Resources.
- Be objective. Use words that will be understood outside your team or department.
- Be selective. Use words that cover the whole subject of a document, and where you will want that document to appear when someone does an intranet search for that word or phrase.
- The OU web standards document requires **5** keywords to be applied to every document uploaded to a website

In MS Word, if you look under File: Info, the field is called "**tags**", but on the Document information Panel (Developer: Document panel: tick the box next to "**always show document information panel on document open and initial save**") then the same field is called "**keywords**"

3.4 Author/Creator

- Ensuring that the author is correct is especially important for documents which will be available on the internet or intranet.
- The author field is automatically populated with the name of the person who first created the document
- You can add free text if necessary: e.g. if the author should actually be a whole team, or the author does not have an OU email address

4 Images and AV files

With any non-text based file – e.g. images, multimedia, etc, use the **Description** field as fully as you can (e.g. “5 yellow balloons on a red background”).

You may find that the **Name** is more suitable for either:

- Context of where the file is being used (e.g. “figure 3 of doc 1”, or “workshop video 1”)
- An abbreviated naming convention for consistent filing, or
- A shortened description of the contents of the file

5 Quick reference

Filename/ name <ul style="list-style-type: none">• Think about the order for displaying them• Don't use personal names• Don't use ~ # % & * { } \ : < > ? / "• Don't use acronyms, or at least spell them out elsewhere• Use date format YYYY-MM-DD• Use hyphens for internet, intranet or SharePoint documents	Keywords...use words which <ul style="list-style-type: none">• Aren't in the text• You'd expect people to use when searching• Describe the whole document, and can distinguish it from other documents Use 5 keywords for internet and intranet documents
Title <p>Required for internet, intranet and SharePoint documents, and any which don't have descriptive file names</p>	Author <p>Check it's correct, and update it if it isn't</p>
Not text based (image, video, spreadsheet?) – Include a description Reusing a document? Update the properties	