

# Digital File Management: Tips & Tricks to Reducing Your Digital Clutter

**Larissa Kraye**

Leon S. McGoogan Health Sciences Library



**University of Nebraska  
Medical Center**<sup>SM</sup>



# Agenda



Why is file management important?



Folder Structures



Naming Conventions



Organizing & Ensuring Usability



Q&A



# Be Kind to Your Future Self

Where did that file go?

What is in Document1?

Is this the right version of the document?

What does this file name even mean?

What is this .wpd file? Can I even open it?!?!?



# Set Goals

- Who needs to understand this system?
- What time can you set aside for organizing?





# Folder Structure

Top Level

Projects

Distinct Groups

Exhibits

Oral Histories

New Donations

Individual Sections

100th Anniversary

Rural Health

Narrators

Administrative/  
Processes

2022

2023

Granular Sections

Text

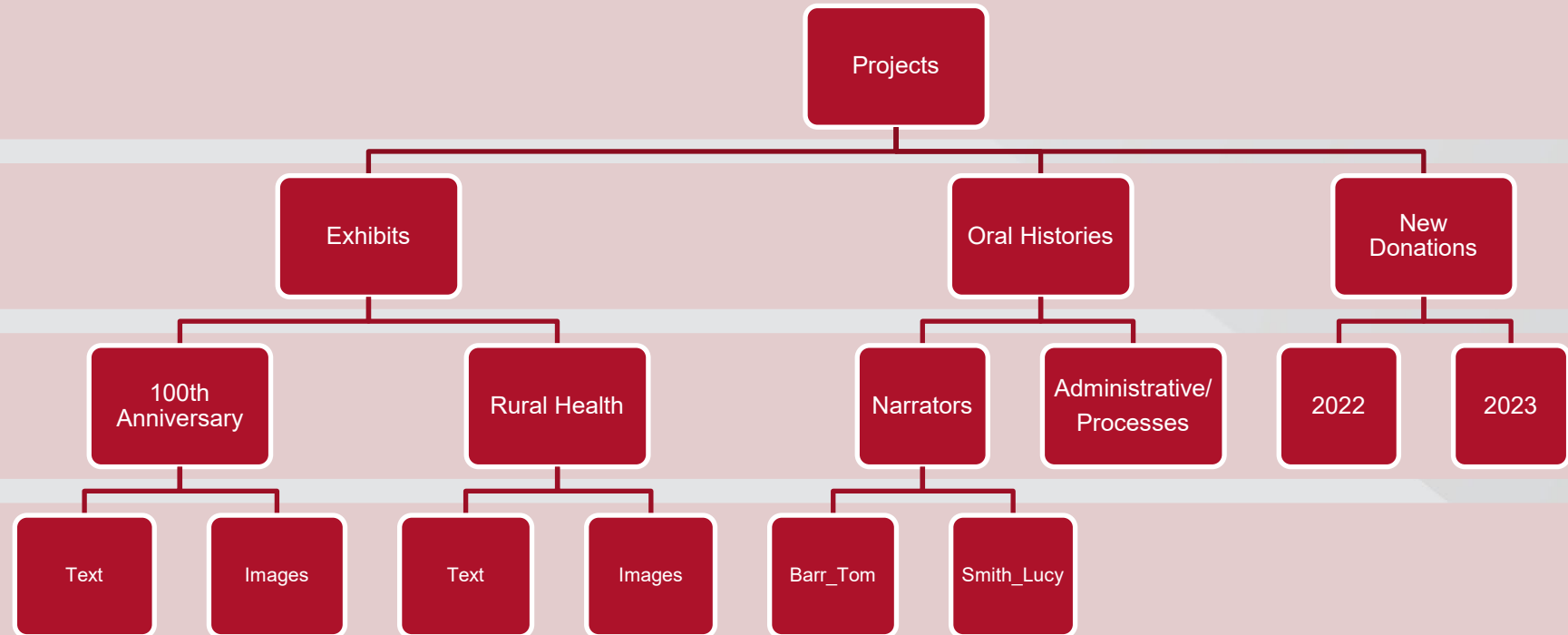
Images

Text

Images

Barr\_Tom

Smith\_Lucy





# Folder Structures

Name	Status	Date modified	Type
Administrative Documents	🔗	10/16/2023 2:08 PM	File folder
Meeting Minutes	🔗	1/26/2023 8:14 AM	File folder
Narrators	🔗	10/11/2023 1:58 PM	File folder
Processes	🔗	7/19/2023 1:49 PM	File folder
VideoEdit_Preservica Information	🔗	9/21/2023 3:50 PM	File folder
TimeTracking.xlsx	🟢	10/16/2023 2:59 PM	Microsoft Excel W...

- Choose a theme
  - Date
  - Project
  - Department/Team
  - Name
- Titles should be descriptive but short
- Resist nesting too deep



# Path Length

- Windows has a 256 character limit
- Long paths can make it difficult to move, delete or share files & folders
- Spaces count as a character
- When creating folders check to see the full path before making many levels



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"C:\Users\larissa.krayer\University of Nebraska Medical Center\McGoogan Library Oral History Program - General\Processes\Style Guide\OH\_FileNameConventions.docx"

C:\Users\larissa.krayer\Desktop\oralhistorydocuments.png

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# File Names

My Stuff.doc

Meeting notes Jan 17.doc

Dr. Jonas picture.jpg



Final FINAL last version.docx

The title of the entire article including every word and author name plus the journal and publisher and date.pdf

05-09-1999 Budget Meeting Minutes.pdf





# Pick a naming convention

- Different file sets can have different conventions
- Identify metadata
  - Pick 2-4 pieces of metadata
  - Examples:
    - Date – YYYYMMDD
    - Name
    - Content type
    - Location
    - Project/Experiment
- Put most important metadata first
  - Determine what sorting will be the most useful
- Separate metadata elements but avoid spaces or special characters
  - Use dashes (-) or underscores (\_)
  - Use Camel Case, ex. FileName.docx



# File Name Example

Project  
Name

Date

ProjectA\_MeetingNotes\_2023-01-04\_SmithE.docx

Content Type

Name of  
Notetaker



# Abbreviations/Acronyms

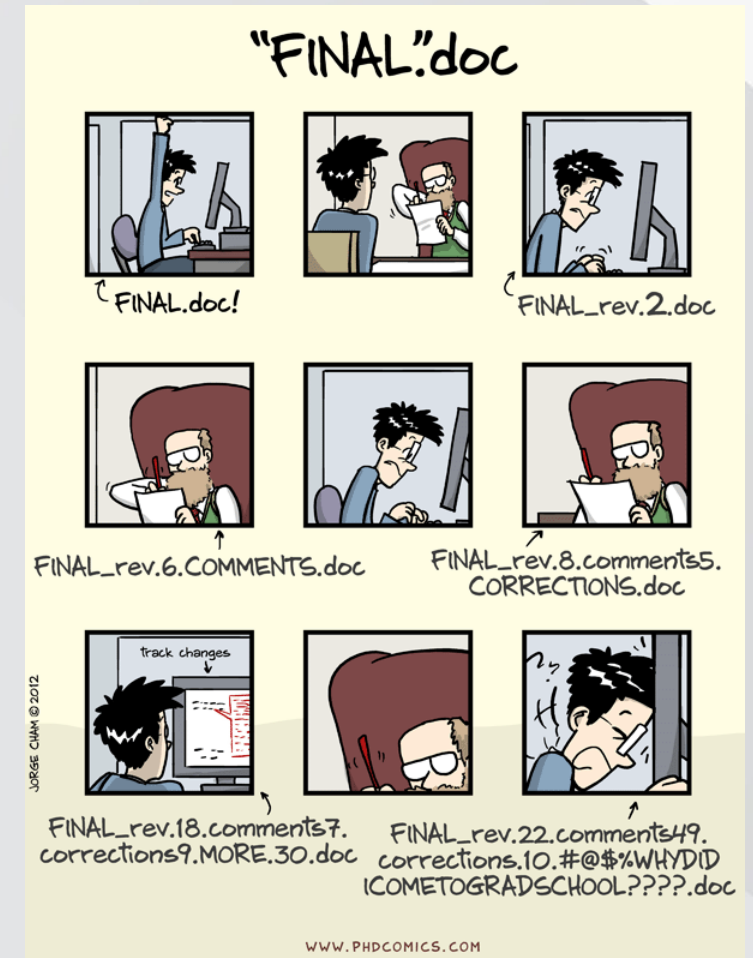
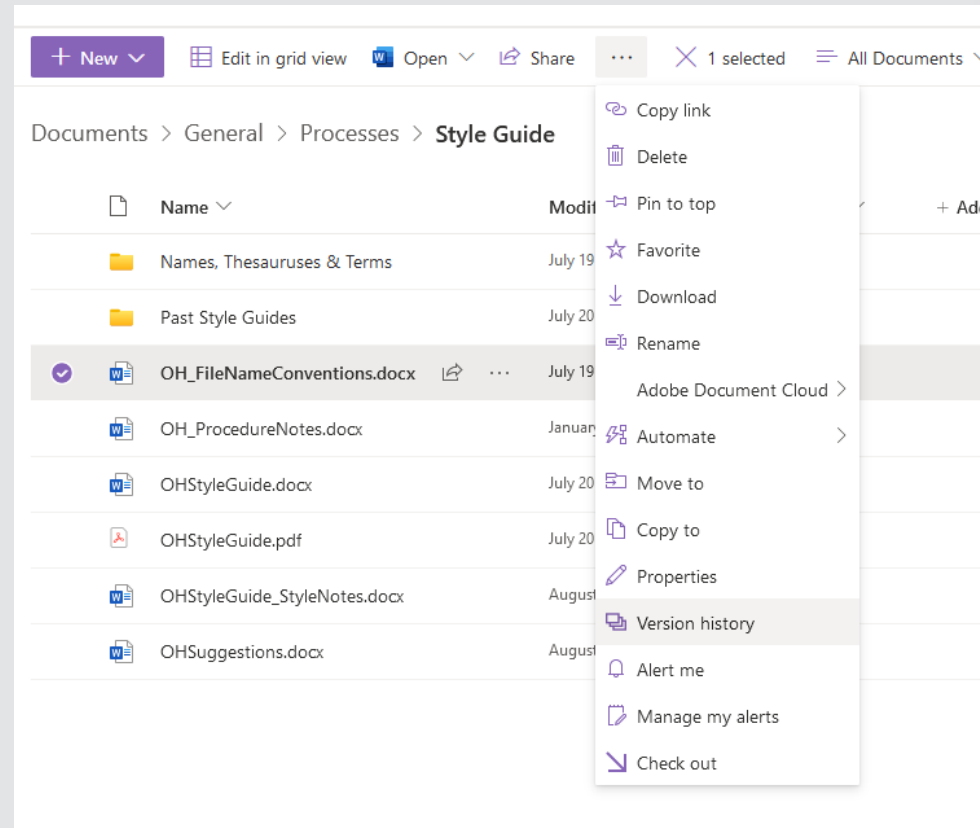
- Use to shorten folder and file names
- Can be used for projects, experiments, names.
- Write them down





# Version Control – Do you need it?

- Use a version number or date at end of the file name.
- If using numbers, use leading zeros to help sort. Ex: v01
- Try not to use Final, other options can include Draft and Approved for policies and procedures.





# Document it!



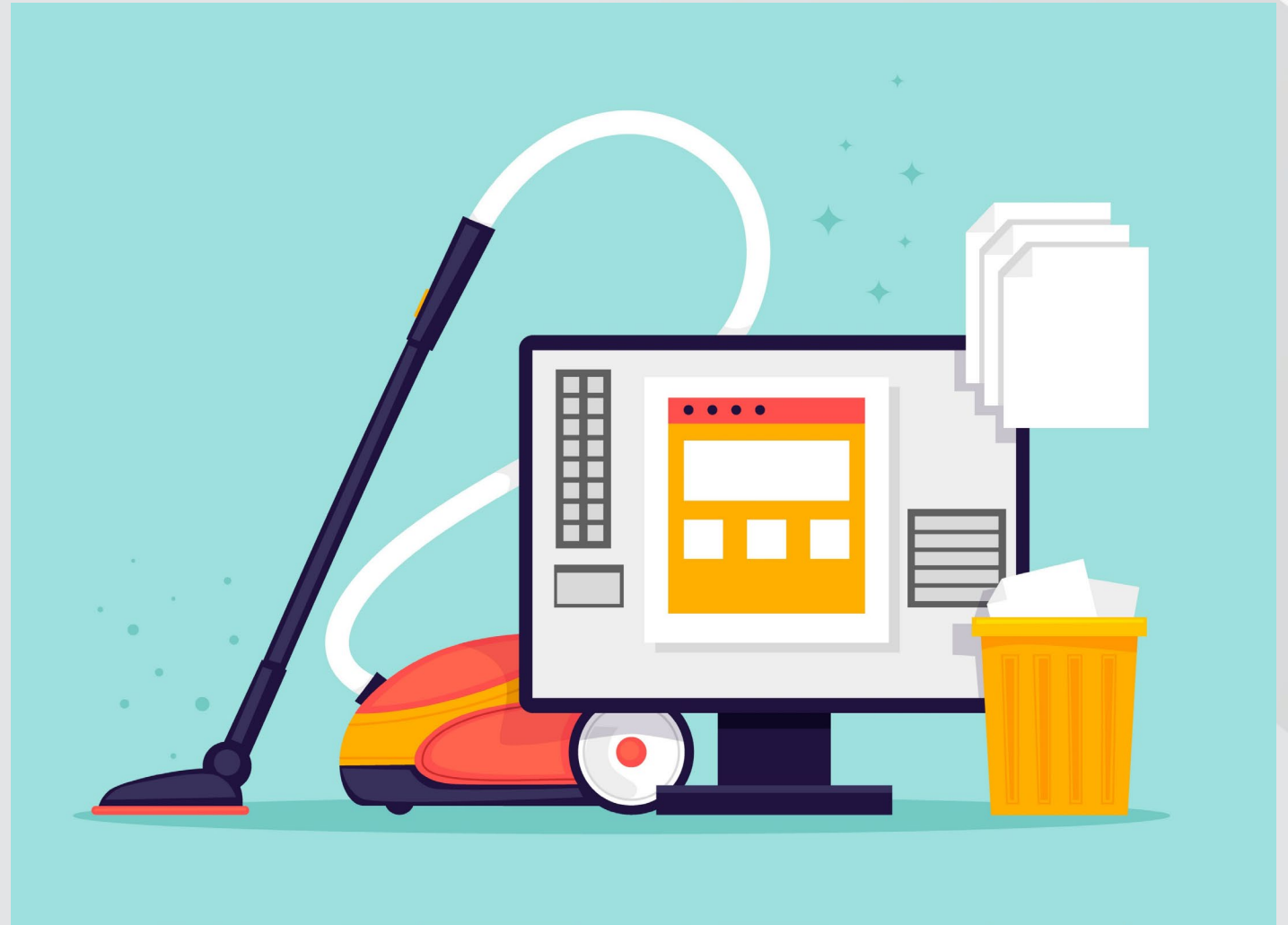
**KEEP  
CALM  
AND  
DOCUMENT  
EVERYTHING!**

- Use a README.txt file in your folder to document your naming convention.
- Allows others to identify files from its name.
- Example: *My file naming convention is [SA-MPL-EID]\_[YYYYMMDD]\_[###]\_[status].[tif]*



# Organizing & Cleaning up

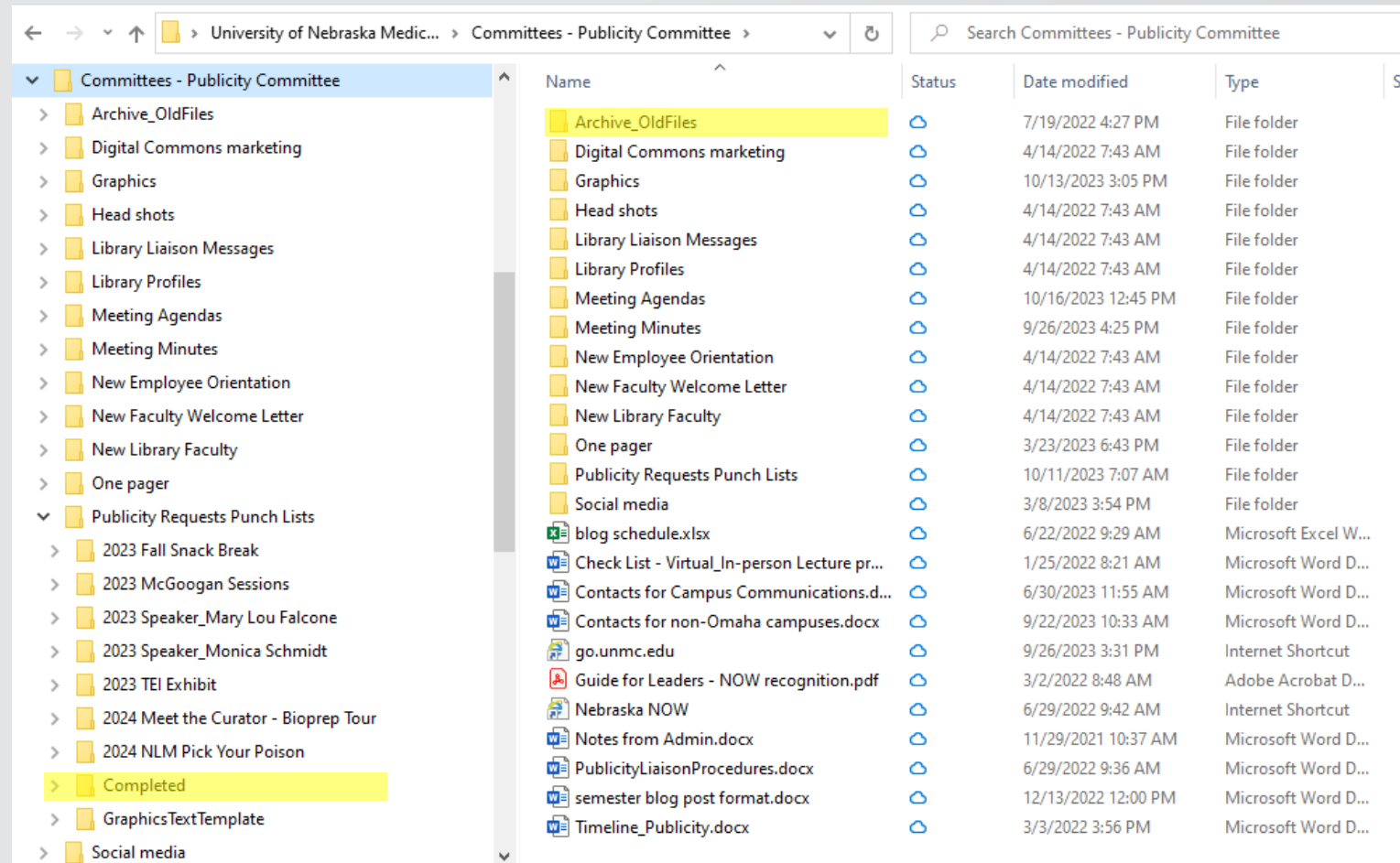
- Name your file at time of creation & save it to the appropriate folder
- Determine a schedule for clean-up
- Dedicate time
- Things to clean-up
  - Sort files into folders
  - Old/Unused files
  - Convert to file formats for longevity
  - Rename files





# Archiving Older Files

- Review files for activity
- Determine if it should be saved or can be deleted
- Move to an “Archive” or Completed folder





# File Formats



- Use or convert files to formats with more longevity.
- Options:
  - PDF
  - Open Document Format
  - TIFF or PNG





# Renaming in bulk

- Using Tab key to manually change names
- Microsoft PowerToys includes PowerRename

The screenshot shows the 'PowerRename' settings window. On the left is a sidebar with various PowerToys settings, with 'PowerRename' selected. The main panel is titled 'PowerRename' and contains the following sections:

- Enable PowerRename:** A toggle switch that is currently turned 'On'.
- Shell integration:** A dropdown menu set to 'Default and extended context menu'. Below it is a blue callout box with an information icon and the text: 'Press Shift + right-click on files to open the extended context menu'.
- Auto-complete:** A toggle switch for 'Enable auto-complete for the search & replace fields' is turned 'On'. Below it is a dropdown menu for 'Maximum number of items' set to '10'.
- Behavior:** A toggle switch for 'Use Boost library' (with the subtext 'Provides extended features but may use different regex syntax') is turned 'Off'.
- Attribution:** Credits 'Chris Davis's SmartRenamer'.



# Your Future Self Will Thank You



- Develop and use folder structures & naming convention.
- Document it!
- Set-up a schedule and dedicate time to clean up folders.



# Questions

# Thank You!

Larissa Kraye

[Larissa.Kraye@unmc.edu](mailto:Larissa.Kraye@unmc.edu)

