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Learning Outcomes

- Discuss proper file management techniques for local files

File management includes folder structures and naming conventions, plus the choice of appropriate formats. Before we begin our discussion, take a moment to think about how you name files that you create.

Practice Question

Which do you think is a best practice for naming files in order to create an effective management system on a computer?

Use lowercase letters to delimit words for names.

[See this interactive in the course material.](#)

With regards to folder structures, a good way to go about organizing your data is to create a hierarchy of folders. As an example, you could use a folder for each project, with two subfolders:

- “Data,” to store your research data, including images, databases, media, etc.
- “Documentation,” to store all relevant project documents, including, e.g. methodology and consent forms.

The more complex the project, the more detailed your folder structure can be. If you are working alone or in a small team, you might wish to use just a handful of subfolders. However, if you work on a large project you could create a range of subfolders to suit the team’s needs. As an

example, under “Data,” you might create a subfolder for each data type, such as “Databases,” “Images,” and “Sounds.” Similarly, under “Documentation” you might create a subfolder for each category of document, such as “Methodology,” “Consent forms,” and “Information sheets.”

When it comes to file naming, we recommend using simple but meaningful names. Best practice includes the following:

- Capital letters should be used to delimit words in the place of spaces or underscores
- File names and paths should avoid unnecessary repetition and redundancy
- Numbers should always include at least two digits (i.e. 01 to 09 instead of 1 to 9)

Naming will follow a convention chosen by you and other project members. For instance, you may decide that “InterviewTra07JD20180214” means “Interview Transcript 7, written by John Doe, on 14/02/2018.” You will need to describe such conventions as part of your study metadata.

Practice Question

Which of the following file names follows a recommended practice for effective management system on a computer?

092030_BoardReportFirstDraft.pdf

[See this interactive in the course material.](#)

Finally, choosing appropriate file formats is key to ensuring data is reusable, as some formats become obsolete in time and may make your research inaccessible. You can use whatever software or format is convenient during your work, but when sharing the data you should follow best practice and ensure future reusability of your work. The US Library of Congress maintains a [recommended formats statement](#), which we invite you to consult. This lists a series of file formats in order of preference by output type, including recommended metadata fields.

When saving data for sharing, you might need to convert your working files. If you do so, always ensure that the conversion was successful and that no errors appear (e.g. missing values, wrong characters, text formatting, resolution, etc.).

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