



Managing naming, and saving files on a shared electronic drive

Have you ever spent way too long searching for the right file? A clear system for naming and organizing electronic records saves time and reduces frustration. When everyone uses the same approach, files are easier to find, even if you didn't create them, and you don't have to open multiple documents to figure out what they are. Good naming conventions include key details like subject, date (in a consistent format such as YYYYMMDD), and version number. Organizing files into logical folders by subject or function keeps things neat and searchable.

Version control is also important—using clear numbering for drafts and final versions prevents confusion when multiple people are editing. Regular clean-ups based on retention schedules help keep storage manageable, and security measures like restricted access and password protection protect sensitive information.

For questions regarding the maintenance, destruction, or preservation of university records, please contact the University Records Manager, Danielle Hall, at dnhall@ksu.edu.

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Benefits of an Agreed Approach

- To create understandable, consistent and predictable names for documents.
- To improve ease of location for information, even you did not create it.
- To enhance confidence that your information search has produced everything you need.
- To distinguish documents from one another more easily, you shouldn't have to open every single document to get an idea of what it's about.
- To enable the sorting of documents in a predetermined logical sequence.
- To ensure the appropriate deletion of documents when no longer required for use, or when the agreed retention period has ended.

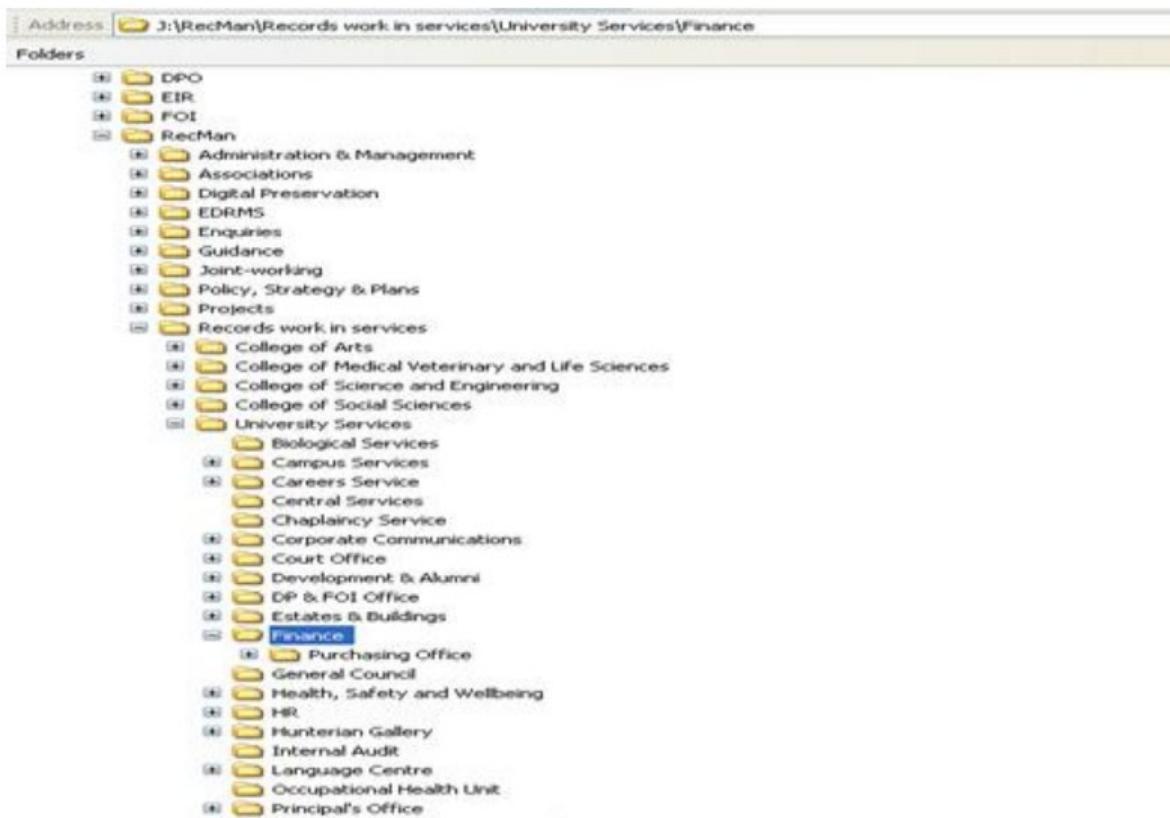
Use logical file names and structures

- Be concise but include relevant details: **subject**, **date**, and **version** if needed.
- Use a consistent date format:
 - Specify arrangement of dates (e.g. YYYYDDMM or DDMMYYYY)
 - Recommended: YYYYMMDD (e.g., 20260114) for clarity and chronological sorting.
 - Place the date at the **start** of the file name for easy sorting.
 - Specify whether spaces, underscores, or capital letters will limit new words e.g.
 - *Examples*
 - *20140911_records_management_guidance*
 - *11092014RecManGuidance*
 - *20140909 Email from GT to SH re DP training session*

Use of folders and subfolders

- Store all documents in a designated folder or subfolder, avoid loose files.
- Top level folders should be arranged by subject or function.
- Subfolders should be arranged by the type of record that comprises the higherlevel subject/function, and then categories within that record type e.g.
 - *Finance > Invoices > 2023-24*
 - *Legislative records > Asbestos > Clearance reports > 2025*
- There should be a limit in place for the number of subfolders within subfolders.
 - This limit should be determined based on business need, but clearly communicated to all staff.
- To keep the file structure clear and manageable, permissions to create folders in the top levels should be limited to specific staff members with administrative authority.
 - The exact number of restricted levels should be determined based on business need.

Below is an example of a clear, structured filing system on a shared drive. The folder names are clear, and they are relevant to a team and not to a particular individual. Sub folders are arranged alphabetically for ease of reference.



Version control

- Version numbers should be included in the name of a document if various members of staff are working on it at the same time.

- Ensure that all staff working on a file are using the same method of version control.
- **Drafts:** drafts may be circulated while they are in progress. The draft will start off as version 0.1. Following any changes it should be renamed 0.2, 0.3 and so on. Anything with a 0. is in draft format.
- **Final document:** once you have made all necessary changes to the draft, the agreed and issued document is version 1.0.
- **Minor change:** any minor changes you make to the issued document would be reflected in the numbers that appear after the v1. For example, subsequent minor changes to version 1.0 becomes version 1.1 then version 1.2 etc....
- **Major change:** Any major change to this document after this would then become version 2.0. You would increase the document version number with each new version. The version number should be at the end of a document name.
 - *Examples:*
 - **Drafts:** Start at 0.1 for the first draft, then 0.2, 0.3, etc. Anything starting with 0. is a draft.
 - **Final Issued Document:** 1.0
 - **Minor Changes:** Increment the second digit (e.g., 1.1, 1.2).
 - **Major Changes:** Increment the first digit (e.g., 2.0, 3.0).
- Always place the version number at the **end of the file name**.
 - *Example:*
 - *20260114_RecordsManagement_v0.3 (draft)*
 - *20260114_RecordsManagement_v1.0 (final)*
 - *20260114_RecordsManagement_v1.2 (minor update)*