Folder and File Naming Conventions – A Traffic Manager's Dream

Working at an ad agency, we all have our hopes and dreams. Some may want to ride jet skis off the coast of Panama, win the World Series of Poker, maybe even backpack through Bali. And while spontaneous ventures are normal for those living the agency life, it's also true that their work needs to have some structure, because it is the structure within your work endeavors that allows you the ability to break free on your down time.

So here at evok, as much as we play hard, we also work hard and one of the key elements of our workflow process is having sound file naming conventions. It may seem easy enough, but file name conventions can actually be tricky. If you don't have a good file naming system, your files may be lost to you and your team, which will make things challenging on days when rush projects are piling up and your account service team is working hard to keep promises to their clients.

There isn't one right way to name files. The best way will depend on the user's or the company's workflow structure. A good practice is to develop a company-wide naming system so that everyone is on the same page. The naming convention can be derived from a client name, job number or abbreviation of the job's detail. In time, you'll find that endless file searches and wasted time will be a thing of the past!

Some operating systems have rules or limitations on file naming which will only allow you to include a certain number of characters or select symbols within your file name. Also, many will only accept certain file extensions, so you must be familiar with your operating system and servers before deciding on a file naming convention.

When creating certain documents or creative materials, there may also be different versions of the same file that should be saved additionally and not written over. This is a good practice if you have enough storage space depending on your file size. A folder that contains copy, for example, may contain a naming convention such as V2, V3 and so on.

Every new project has a project number assigned to it before anyone can begin working on it. Account Executives may have meeting notes kept within a common area for themselves, but when an estimate is approved and the project is ready to go into production (copy, creative, layout, photography etc...) it is a good practice to keep ALL assets for the project in one place, it's Project Folder.

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To help get you started, here's a look into evok's file naming conventions:

FOLDER NAMING: All of our work is saved under a project folder with the appropriate project number on it. Our project numbers are created using the current year, client abbreviation and a job number that is generated by our workflow management system. For example, when a new project is opened for evok in the year 2011, a folder named 11_EVOK_0100 may be populated. In February, we might see a folder labeled 11_EVOK_0150. This would be the 150th project created for evok. This naming convention is also very helpful when archiving or referring to existing or previous project alike.

SUB FOLDERS: Within each project folder, we also like to create additional folders. For example, if 11_EVOK_0155 is a new project, you may see:

COPY includes word docs of copy decks with version suffix. ex. 11_EVOK_5555_v2.doc
COMPS also contains a STOCK photo folder for spec stock. Numerous folders with rounds of revisions may be found here as well.
IMAGES any additional image which is not part of an image library and is usually specific to that project. This can include photoshop and illustrator files.
STOCK for purchased stock photography, and only if it pertains to this one-time usage.
SUPPLIED can be any files that have been supplied FROM the client that effect the project BUT not native to it. Ex. Previous brochure that we are modifying but NOT their logo.
PROOF contains low-res proofs. If proofs are archived, then naming scheme should be file name followed by underscore and version number.
PDF contains Hi-res.. ex. 11_EVOK_5555_HR.pdf.
OTS or **COLLECT** depends on client and final production.

CATEGORIZE BY MONTH: Let's say this PR campaign lasted for 3 months – March, April and May and we wrote a different press release each month, but wanted to keep it in one project for the quarter. Within a Press Release folder we would create additional folders categorized by month. Instead of creating folders named March, April and May, we would want to create folders name 03 – March, 04 – April and 05 – May. You might notice that the 03 comes before March because March is the 3rd month of the year. This way, when you are scrolling through your files, you are looking at your months chronologically rather than alphabetically which is a great folder naming convention.

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KEEP YOUR VERSIONS STRAIGHT!: Many of the creatives in our agency have had the pleasure of presenting work to clients. Sometimes a client, even if they love the idea, may want to see another concept with some revisions. Once you go into the file and change the ad, it's important that you save it as a separate version. If the original layout version was called Bartender.indd, the new version should be called Bartender_v2.indd. The purpose is this – you ask? What if upon making the suggested change, they want to revert to the original layout. In this case you still have it and it is not written over. There are also plug-ins that may be used in your application programs that save these "layers" as such.

FINAL FILE NAMING: This really does depend on the final outcome of you project. It may be an ad that a publication is requesting and a certain file naming convention is required. It may have a HR.pdf naming convention signifying a High Resolution file. It may have the word FINAL in the name. It really depends on how you structure your system and consistent you are with it.

I could continue to ramble and give you example after example, but I hope you get the basic concept. It's not a good idea to name your file NEW BROCHURE.indd or INTRO COPY.doc. You'll get confused, waste time, and look foolish to a client when you give them the wrong proof. You can be as creative or as basic with your naming conventions as you wish, as long as everyone on your team is working the same way. Using a similar system above will serve to create a better working environment and a better workflow process.