File Management Systems

Discovery

Whether you are cleaning up an existing filing system or setting up a new one, here are some big-picture things to document. This is a great list to go over as a team. It is the starting point to discuss your files and where they fit in a structure.

The Company:

1. What are the products or services?
2. Why do people use our products and services? What problem is the company solving?
3. Where are all of the products and services accessed? Online, in-store, or in a password-protected portal?
4. Where is the content for those located? Name websites, software, servers, vendors, spreadsheets, etc.
5. Are there new products in development?
6. Are there categories into which you can group products or services
7. When and how often do products and the content about the products change? Note sales cycles, product launches, annual events, and industry standards.
8. Who uses, builds, or sells the products, services, and subsequent content/files? We want to consider all the touchpoints, not just product owners and customers.
    - Internal: Individual Contributors, SMEs (Subject Matter Experts), Leadership, Sales, IT, Marketing, Customer Service, etc.
    - External: Clients, Vendors, Prospects, B2B or B2C

Departments/Divisions:

9. What are the departments/divisions?
10. What process do those teams own?
11. What processes does your team help with?
12. How are these related to each other, the company, departments, people, and existing files? For example, does a specific product marketing team have its own processes, files, and systems, or are processes more centralized?
13. What files/content are being created in each division/department? Don't just think about external content like websites, ads, flyers, and social. Consider data analytics, dashboards, portals, talking points, sales conversations, invoices, and random Word documents. This is helping you understand the big picture.

Your Team:

14. What processes does your team own?
15. What does the current file structure look like?
16. What departments use your file system(s)?
17. What are the priorities for your files? Are there some items, folders, or spaces that are frequently used and should not be buried in the structure?
18. Are there easy or hard-to-find items that can be addressed?
19. Why is the content created? Retain or sell to clients or prospects general company information, regulatory requirements, branding, thought leadership, FAQs, or how-tos (internal and external). If you cannot answer a why to any process or file, it is a great time to investigate why you are still doing it.
20. Are file names confusing or are files often misplaced?

The goal is to get an overview of products, services, and stakeholders and their relationships. To understand your file structure, you need to understand the company's structure.

File Management Systems

Best Practices

In discovery, you should find natural structures and relationships that will become the required information to build a robust file system. For example, your company may have five core products, three target audiences, three teams that use the content your team is responsible for, file types, asset ID, and/or a job number, all things required to identify and store files and folders effectively.

Organized Folder Structure & Metadata and Tagging

Traditional servers and software often rely on folder structures. This is an older way to organize data and is still very common. Systems that don't have robust metadata and tagging rely on a clean folder structure to keep the system working.

For folders:

- Create a hierarchy of folders and subfolders.
- Group related files together in relevant folders.
- Keep it simple if you want users to adopt the structure.

When software or servers allow for the use of metadata and tagging, remember the following:

- Create categories, tags, and custom fields that are reusable and easy to search.
- Research and utilize metadata/keyword fields to provide additional context to files.
- Tag files with relevant keywords to enhance searchability.
- Add technically inaccurate keywords. People will use different names to describe items. For example, if you know the whole sales team calls the product flyer a one sheet or white paper, it will help them use the system if all three names can be searched.

Naming Conventions

- Create a naming convention and stick to it.
- Avoid naming structures that require you to rename folders or categories regularly.
- Use short, clear, and descriptive names.
- Avoid using spaces and special characters; instead, use underscores or dashes.

When using DAM or any content management system, it is essential not to use identifiers in file names that change over time. In a live digital environment, you want the published files to have long-lasting names that exclude dates, version numbers, or job numbers. The metadata should handle those variables. Keep file names clean and short, use the tools provided with the software to manage the details.

Standardize File Formats and Templates

- Decide on standard file formats and templates for documents, spreadsheets, images, etc.

Job Numbers Asset IDs and Project Management

If your job number/Asset ID changes every time you change a file, it is best not to include it in the file name, especially when it is published.

You can approach Job and Asset ID numbers a couple of ways.

Either job numbers are related to tasks and project management and are not appended to file names. Asset IDs are created and used in the file name and do not change when the file is updated. OR Job numbers represent the asset as its ID. Whenever changes to that asset are made, the project is reopened for rework.

Version Control

- Use version numbers to track changes on working files on traditional server systems (e.g., report_v1, report_v2).
- Version numbers should not be on files uploaded in DAM systems with version control built in. Use the metadata and built-in fields to describe the file properly.
- For collaborative work, consider using version control built into the software and do not add dates, as the software will also track dates.

NOTE: Consider where collaborative work is saved in the cloud. If a team member is no longer with the company and has a widely used shared file on their personal cloud drive, everyone could lose access when their account is turned off. Collaborative files should be saved in collaborative spaces.

Files on servers, websites, and DAMs can become unmanageable because new files are uploaded with a new job number or ID every time there is a change. This results in hours of work relinking files online, and over time, with every new file upload, there are places where old file links are missed. The key is minimal rework and low touch. You want to create an ecosystem without duplicates and with one truth source.

Use Cloud Storage Wisely

- Leverage cloud storage for easy access and collaboration.
- Ensure cloud storage has proper security measures.

Access Control and Permissions and Security

- Set appropriate access permissions for different users.
- Regularly review and update access controls to maintain security. If you have vendors and clients with limited access, remember to remove their access when changes occur.
- Make sure the software meets or exceeds authentication requirements. This usually means secure sign-on with two-factor authentication.

Regular Maintenance

- Schedule regular audits to delete or archive obsolete files.
- Ensure backup copies are up-to-date and stored in a secure location. This is usually an IT function check with them to ensure back-ups are happening at an acceptable frequency.
- Test recovery processes periodically to ensure data can be restored.

Training and Documentation

- Provide training for users on file management best practices.
- Maintain documentation outlining the file management system and procedures.