

File Classification and Naming Methodology

To ensure a clear, consistent, and sustainable system for organizing folders and files, it is recommended to adopt a naming methodology based on four essential pieces of information: **Who? What? Where? When?** This approach makes it possible to locate a document quickly, understand its content without opening it, and maintain a consistent organizational structure, including when files are transferred between different computer systems.

The naming convention can therefore follow the following sequence: **“Who”**, meaning the user, person, department, or entity concerned; **“What”**, corresponding to the name or type of content or document; **“Where”**, when the location, site, or geographical area is relevant; and finally **“When”**, corresponding to the date associated with the document. Any sub-content or additional levels of information can be added progressively while following the same logical order. When the classification is primarily based on a location, site, or geographical area, this information can naturally be placed before the date in order to facilitate searches and the grouping of documents.

For example, a file could be named:

`dupont-rapport-inspection-lausanne-20260919.pdf`

In this example, `dupont` represents the **“Who”**, `rapport-inspection` the **“What”**, `lausanne` the **“Where”**, and `20260919` the **“When”**. The date is therefore directly incorporated into the file name, making the document immediately identifiable regardless of the creation or modification date recorded by the computer system.

To ensure maximum compatibility between different systems, it is preferable to avoid spaces and special characters in folder and file names. **Hyphens (-)** should preferably be used, or, depending on the convention adopted, **underscores (_)** may be used to separate the different elements.

For example:

`dupont-rapport-inspection-lausanne-2026-09-19.pdf`

or:

`dupont_rapport_inspection_lausanne_20260919.pdf`

It is also recommended to use simple alphanumeric characters and, wherever possible, to avoid accented characters, special characters, and punctuation marks that may be interpreted differently by different systems.

This precaution may seem less necessary with modern computer systems, which generally support spaces and a wide range of characters in file names. However, experience shows that compatibility issues can still occur when files are transferred to servers, applications, or infrastructures based on older technologies. Some web servers or computer systems may, in particular, incorrectly interpret or reject spaces in file names. A simple, predictable naming convention that is independent of the system being used therefore helps reduce these risks and ensures better long-term document portability.

The purpose is not merely aesthetic: **a good file name is a genuine piece of descriptive information**. It should allow any person, and ideally any computer system, to immediately understand who is concerned, what the document is about, where it relates to, and when it was created, while remaining compatible with different computing environments.

Following exactly the **Who → What → Where → When** logic, several folder structures can be considered depending on the desired level of detail.

1. Simple Folder Structure — Suitable for General Organization

```

documents/
├── dupont/
│   ├── reports/
│   │   ├── inspection/
│   │   │   ├── lausanne/
│   │   │   │   ├── dupont-report-inspection-lausanne-2026-09-19.pdf
│   │   │   │   └── dupont-report-inspection-lausanne-20261015.pdf
│   │   │   └── fribourg/
│   │   │       └── dupont-report-inspection-fribourg-20260920.pdf
│   │   └── maintenance/
│   │       └── dupont-maintenance-report-fribourg-20260921.pdf
│   └── correspondence/
│       └── dupont-letter-lausanne-20260919.pdf
├── martin/
│   ├── reports/
│   │   ├── inspection/
│   │   │   └── geneva/
│   │   │       └── martin-report-inspection-geneva-20260919.pdf
│   └── correspondence/
│       └── martin-letter-geneva-20260920.pdf
└── shared/
    ├── templates/
    ├── procedures/
    └── references/

```

Here, the folder structure starts with the **“Who”**, then moves down to the **“What”**, the **“Where”**, and finally the **“When”**, which is primarily contained in the file name.

2. Content-Oriented Folder Structure

When the volume of documents is significant, it may be more practical to place the nature or type of document first:

```

documents/
├── reports/
│   ├── inspection/
│   │   ├── lausanne/
│   │   │   ├── dupont-report-inspection-lausanne-2026-09-19.pdf
│   │   │   └── martin-report-inspection-lausanne-20260920.pdf
│   │   └── fribourg/
│   │       ├── dupont-report-inspection-fribourg-20260921.pdf
│   │       └── geneva/
│   │           └── martin-report-inspection-geneva-20260922.pdf
│   └── maintenance/
│       ├── lausanne/
│       └── fribourg/
├── correspondence/
│   ├── lausanne/
│   ├── fribourg/
│   └── geneva/
├── contracts/
│   ├── lausanne/
│   └── fribourg/
└── references/
    ├── procedures/
    ├── templates/
    └── standards/

```

This structure is particularly useful when the **type of document is more important than the person** when performing searches.

3. Geographical Folder Structure

If location is the primary search criterion, the logic can be reversed:

```

documents/
├── switzerland/
│   ├── fribourg/
│   │   ├── dupont/
│   │   │   ├── reports/
│   │   │   │   └── dupont-report-inspection-fribourg-2026-09-19.pdf
│   │   │   └── correspondence/
│   │   │       └── dupont-letter-fribourg-20260920.pdf
│   │   └── martin/
│   │       └── reports/
│   │           └── martin-report-inspection-fribourg-20260921.pdf
│   └── vaud/
│       ├── lausanne/
│       │   ├── dupont/
│       │   │   └── reports/
│       │   │       └── dupont-report-inspection-lausanne-20260922.pdf
│       └── geneva/
│           ├── geneva/
│           │   └── martin/
│           │       └── reports/
│           │           └── martin-report-inspection-geneva-20260923.pdf

```

This approach is particularly relevant when employees primarily work by **site, building, municipality, region, or geographical area**.

4. An Important Rule: Do Not Put Everything into the Folder Structure

In my view, this methodology is more effective when a distinction is made between the **physical organization of the file** and the **information contained in its name**.

For example, rather than:

```

2026/
├── september/
│   ├── lausanne/
│   │   ├── dupont/
│   │   │   ├── report/
│   │   │   │   ├── inspection/
│   │   │   │   │   ├── 19/
│   │   │   │   │   │   └── document.pdf

```

a reasonably short folder structure can be maintained:

```

reports/
├── inspection/
│   ├── lausanne/
│   │   └── dupont-report-inspection-lausanne-20260919.pdf

```

The file name then contains sufficient information to remain understandable even when the file is removed from its original folder.

5. Proposed Naming Convention

The rule can be formalized as follows:

WHO-WHAT-SUBCONTENT-WHERE-WHEN.extension

For example:

dupont-report-inspection-building-lausanne-20260919.pdf

or, when several levels of content are required:

dupont-report-inspection-building-roof-lausanne-20260919.pdf

For dates, the **YYYYMMDD** format is particularly practical because it provides a natural chronological order when files are sorted alphabetically.

For example:

dupont-report-20260901.pdf
dupont-report-20260915.pdf
dupont-report-20260919.pdf
dupont-report-20261002.pdf

These files will automatically be sorted in chronological order without requiring the date to be interpreted manually.

The general principle can therefore be summarized as follows: **the folder structure is used to organize the main categories, while the file name contains the information required to identify the document independently**. This avoids creating excessively deep folder structures and makes it easier to search for, move, archive, and transfer files.

Visual and Computer-Based Document Search

The proposed classification methodology is also intended to facilitate the **visual search of documents**. A clear and consistent folder structure allows users to navigate through folders intuitively and immediately understand where a document is located. The **Who / What / Where / When** structure therefore provides a logical framework for navigating the folder hierarchy without having to open a large number of files one after another. Folder names should be sufficiently descriptive, while also remaining reasonably short in order to avoid creating an excessively deep and difficult-to-navigate folder structure.

Visual search is particularly useful when the user has an approximate idea of where the document is located. For example, someone looking for an inspection report relating to Lausanne can navigate through **reports** → **inspection** → **lausanne** and then identify the appropriate document from its file name. The standardized naming convention makes it immediately recognizable among several similar documents.

However, this organization should be complemented by the **search tools built into computer operating systems and applications**. When the user does not know the exact location of a file, they can search using one or more elements contained in its name. They can search for the person's name, a characteristic keyword describing the content, a location, or a date.

For example, a search for:

dupont

will identify files associated with that person, while a search for:

inspection

will identify the various inspection reports. A more specific search, such as:

lausanne 20260919

can further reduce the number of results when the search system supports multiple search terms.

Following a consistent naming convention significantly improves the effectiveness of these searches. Important keywords always appear in a predictable position within the file name and use consistent spelling. It is therefore advisable to avoid using, for example, Lausanne, lausanne, Lausanne-ville, and VD-Lausanne interchangeably to refer to exactly the same location, unless such distinctions are genuinely required. A common convention facilitates both manual and automated searches.

Including the date in the file name also provides an important advantage when searching. By using a standardized format such as **YYYYMMDD**, it becomes possible to search directly for a specific date or period while maintaining a natural chronological order.

For example:

dupont-report-inspection-lausanne-20260901.pdf
dupont-report-inspection-lausanne-20260915.pdf
dupont-report-inspection-lausanne-20260919.pdf
dupont-report-inspection-lausanne-20261002.pdf

The user therefore has several complementary ways of locating a document: **by visually navigating the folder structure, by searching for the file name or a keyword, by person or entity, by document type, by location, or by date**. The classification system is therefore not dependent on a single search method. If one piece of information is unknown, the other elements of the file name may still make it possible to locate the document.

The objective is therefore to design an organization that is simultaneously **understandable to people, easy to navigate visually, and effectively searchable using computer-based search tools**. The classification system should not only answer the question, “*Where should I store this file?*”, but also the question, “*How will another person be able to find this file several years from now?*”