

SOP Template: Source File Assessment and Preparation Guidelines

This SOP details **source file assessment and preparation guidelines**, covering the evaluation of file formats, resolution and quality checks, content verification, metadata validation, and necessary pre-processing steps. The goal is to ensure that all source files meet the required standards for seamless integration into production workflows, minimizing errors and optimizing efficiency.

1. File Format Evaluation

- Verify file types against accepted list for workflow compatibility (e.g., .docx, .xls, .pdf, .jpg, .png).
- Check for unsupported, corrupted, or proprietary formats and flag for conversion.
- Ensure file extension matches actual file content/type.

2. Resolution and Quality Checks

- For images: Confirm minimum resolution (e.g., 300 DPI for print, 72 DPI for web).
- Check for visible artifacts, compression issues, or blurriness.
- For documents: Verify text legibility, page orientation, and completeness.
- Use validation tools or software for automated quality assessment where possible.

3. Content Verification

- Ensure files contain complete and relevant information for intended use.
- Check for accidental redactions, missing pages, or incomplete data.
- Validate correct language, version, and edition.
- Seek clarification for any content discrepancies before further processing.

4. Metadata Validation

- Review embedded metadata (title, author, date, keywords) for accuracy and completeness.
- Update or standardize metadata fields according to organizational requirements.
- Remove unnecessary, sensitive, or erroneous metadata.

5. Pre-processing Steps

- Rename files according to established naming conventions.
- Convert files to required formats as necessary (e.g., PDF to Word, image format standardization).
- Compress or split large files for optimized handling and upload.
- Organize files into appropriate folders or archive structures for easy retrieval.

6. Compliance & Documentation

- Maintain a checklist or log for each source file with assessment results.
- Document any issues found and the corrective actions taken.
- Ensure compliance with organizational data handling and security policies.

7. Approval & Handover

- Submit prepared files and completed checklists to the designated reviewer/approver.
- Obtain sign-off before files are integrated into the production workflow.
- Archive all assessment and preparation records for future reference.

Appendix: Source File Checklist Example

Step	Status	Comments
File Format Verified	<input type="checkbox"/>	
Resolution/Quality Check Completed	<input type="checkbox"/>	
Content Verified	<input type="checkbox"/>	
Metadata Validated	<input type="checkbox"/>	
Pre-processing Complete	<input type="checkbox"/>	
Review & Approval	<input type="checkbox"/>	

Note: This checklist should be adapted to your organization's exact requirements.