

SOP: File Naming Conventions and Version Control

This SOP defines the **file naming conventions and version control** to ensure consistent, clear, and organized management of digital documents. It includes standardized rules for naming files to facilitate easy identification, retrieval, and classification. The procedure also outlines version control practices to track changes, maintain document integrity, and enable collaborative editing while preventing data loss or confusion between file iterations. Adhering to this SOP improves workflow efficiency, accountability, and communication within the organization.

1. Purpose

To standardize file naming and version control methods across the organization, enabling efficient document handling and collaboration.

2. Scope

This SOP applies to all employees and contractors handling and storing digital files related to organizational operations.

3. File Naming Conventions

All files must use the following naming structure:

[Project/Department]_[DocumentTitle/Description]_[YYYYMMDD]_[Version].[file extension]

3.1. Components

Component	Description	Example
Project/Department	Name or code of project or department	HR, FIN, ProjectX, MKT
DocumentTitle/Description	Brief, descriptive title. Use PascalCase or underscores; avoid spaces.	AnnualReport, Meeting_Notes
YYYYMMDD	Date (Year-Month-Day) of file creation or revision	20240614
Version	Version identifier, e.g., v1, v2.1, draft	v1, v1.2, draft
File extension	Standard file extension indicating format	docx, pdf, xlsx

3.2. Examples

- FIN_QuarterlyReport_20240614_v1.pdf
- HR_PayrollPolicy_20240501_v2.docx
- IT_SecurityAudit_20240610_draft.xlsx

4. General Naming Guidelines

- No spaces or special characters (&, #, %, etc.); use underscores (_) or CamelCase.
- Keep names concise but meaningful.
- All dates must be in **YYYYMMDD** format.
- Indicate version explicitly.
- Use consistent abbreviations.

5. Version Control Guidelines

1. Version Identifiers:

- Initial draft: draft, e.g., v0.1
- First approved version: v1
- Minor revisions: v1.1, v1.2, etc.
- Major revisions: v2, v3, etc.

2. Revision History:

- Maintain a section in the document or a separate changelog to record significant changes, dates, and authors/editors.

3. Collaborative Editing:

- For final documents, consolidate all changes and save as a new version.
- Do not overwrite previous versions; archive superseded files in a designated folder.

6. Storage and Backup

- Store files in organized, clearly labeled directories.
- Back up files regularly per IT policy.
- Restrict editing access to authorized personnel.
- If using cloud services (e.g., OneDrive, Google Drive), adhere to platform-specific recommendations for versioning and sharing.

7. Compliance and Maintenance

- Non-compliance may result in document mismanagement; repeated violations will be addressed by the line manager.
- This SOP will be reviewed annually and updated as necessary.

8. References

- IT Policy Handbook
- Data Management Policy