

SOP: Standard Data Formatting and Naming Conventions

This SOP establishes **standard data formatting and naming conventions** to ensure consistency, accuracy, and clarity in data management processes. It covers guidelines for file naming, date and time formats, version control, metadata usage, and standardized data entry procedures. Adhering to these conventions facilitates efficient data retrieval, reduces errors, and supports effective collaboration across teams and systems.

1. Purpose

To define standards for data formatting and naming to promote data consistency, quality, and streamlined collaboration.

2. Scope

This SOP applies to all personnel involved in data creation, entry, management, storage, and sharing within the organization.

3. Responsibilities

- Data Owners:** Ensure adherence to these guidelines and maintain oversight.
- Data Entry Personnel:** Apply standards during data entry and maintenance.
- IT/Systems Admins:** Implement and enforce procedural controls.

4. Procedures

4.1 File Naming Conventions

- Use descriptive and concise file names.
- Follow the format: **[Project/Dept]_[Description]_[YYYYMMDD]_v[Version]**
- Avoid spaces; use underscores () to separate words.
- Do not use special characters (e.g., !, @, #, \$, %, ^, &, *)

Correct Example	Incorrect Example
Finance_BudgetReport_20240601_v1.xlsx	Budget Report (Final)!.xlsx

4.2 Date and Time Formats

- Always use YYYY-MM-DD for dates (e.g., 2024-06-01).
- Use the 24-hour format for time: HH:MM (e.g., 14:30 for 2:30 PM).

4.3 Version Control

- Indicate version with lowercase "v" and a sequential number (e.g., v1, v2, v10).
- Update version number with each revision.

4.4 Metadata Standards

- Include metadata with all datasets (e.g., author, date created, version, description, data source).
- Maintain a metadata summary file where applicable.

4.5 Data Entry Standards

- Be consistent with capitalization (e.g., use "Title Case" for names).
- Avoid blank cells; use "N/A" or "Unknown" as appropriate.
- Use standard codes/lists where applicable (e.g., ISO country codes, gender codes).

5. Review and Maintenance

This SOP will be reviewed annually to ensure ongoing relevance and effectiveness. Feedback should be sent to the Data Steward for possible updates.

6. References

- ISO 8601: Date and Time Format Standard
- Internal Data Governance Policy

7. Appendix

Common File Naming Examples:

- HR_EmployeeList_20240601_v1.csv
- Sales_Q2Performance_20240601_v2.xlsx
- IT_BackupLogs_20240601_v12.txt