Standard Operating Procedure
Standardized File Naming Conventions

This SOP defines **standardized file naming conventions** to ensure consistency, clarity, and efficient file management across the organization. It includes guidelines on structure, use of dates, version control, descriptive naming, and prohibited characters to facilitate easy identification, retrieval, and collaboration on digital documents while minimizing errors and duplication.

1. Purpose

To establish clear rules for file naming that support efficient searching, version control, and collaboration, reducing risk of errors and redundant files.

2. Scope

This SOP applies to all staff and departments creating, saving, or managing electronic files within the organization.

3. Structure of File Names

- **Project or Department Code** (e.g., `FIN` for Finance, `HR` for Human Resources)
- **Document Description** (Short, clear description of file contents)
- **Date** (YYYYMMDD format)
- **Version Number** (e.g., `v01`, `v02`)
- **File Extension** (e.g., `.docx`, `.xlsx`, `.pdf`)

Example File Name

`FIN_ExpenseReport_20240620_v01.xlsx`

4. Guidelines

1. **Use underscores (_) to separate elements** in the file name.
2. **Always include the date** in `YYYYMMDD` format for chronological sorting.
3. **Adopt version numbers** starting with `v01` and increment as needed (e.g., `v02`, `v03`).
4. **Be descriptive but concise**; avoid ambiguous terms like â€œDocument1â€.
5. **Avoid spaces, special characters** (`/ \ : * ? " < > |`) and limit the use of punctuation. Use only `_` and `-` if necessary.
6. **All file names should be in English**, unless exception is authorized.
7. **Limit file name length** to 50 characters if possible.

5. Prohibited Characters

Do **not** use any of the following in file names:

`/ \ : * ? " < > | [ ] { } ( ) ; , & % $ # @ ! ~`

6. Version Control

- Start with `v01`; increment for each revision.
- Older versions may be archived per department retention policies.
- For drafts, optionally append `_DRAFT` before the version (e.g., `HR_PolicyUpdate_20240620_DRAFT_v01.docx`).

7. Responsibility

- All team members are responsible for following this convention.
- Managers should regularly review compliance.

8. Review and Update

This SOP will be reviewed annually or as needed for improvements or changes.

Appendix: Common Department Codes

Department	Code
Human Resources	HR
Finance	FIN
Information Technology	IT
Operations	OPS
Marketing	MKT
Sales	SAL