Standard Operating Procedure (SOP)
File Naming Conventions and Version Control Protocols

This SOP defines **file naming conventions and version control protocols** to ensure consistent, clear, and organized management of digital files. It includes standardized guidelines for naming files to enhance searchability and reduce errors, as well as procedures for version control to track changes, maintain file integrity, and support collaboration among team members. The goal is to improve efficiency, prevent data loss, and facilitate seamless document management across projects and departments.

1. Scope

This SOP applies to all employees and collaborators handling digital files related to company operations, projects, and documentation.

2. Responsibilities

- All users must adhere to the file naming and version control protocols.
- Managers are responsible for ensuring their teams follow this SOP.
- IT/support staff will assist with implementation and troubleshooting.

3. File Naming Conventions

3.1 General Principles

- Use descriptive, concise, and standardized terms.
- Separate words with underscores `_` or hyphens `-`, not spaces.
- Include essential metadata, such as project, document type, date, and author/initials.
- Use the **YYYYMMDD** date format for consistency.
- Avoid special characters (`/ \ : * ? " < > |`).
- Use lower case letters unless acronyms are required.

3.2 File Name Structure

Element	Description	Example Entry
Project/Department	Project name or department code	hr, sales, projx
Document Type	Purpose or type of document	policy, invoice, report
Date (YYYYMMDD)	Date of creation or edition	20240612
Author/Initials	Creator or editor initials	akh, jdoe
Version	Version number	v1, v2.1

Template Example:
`project_documenttype_YYYYMMDD_initials_vX.ext`
Sample: `sales_report_20240612_jdoe_v1.0.docx`

4. Version Control Protocols

- Always save major changes as a new version (`v2.0, v3.0, etc.`).
- Minor changes increment the decimal (`v1.1, v2.2, etc.`).
- Never overwrite or delete previous versions; archive old versions in a designated folder if necessary.
- Use version numbers consistently at the end of the file name (before the extension).
- Document major changes in a change log when applicable.

4.1 Versioning Example

`marketing_plan_20240612_akh_v1.0.docx` â†' revised â†' `marketing_plan_20240615_akh_v1.1.docx` â†' major update â†' `marketing_plan_20240620_akh_v2.0.docx`

5. Collaborative File Management

- Use shared drives/authorized repositories to store and manage files.
- Check out files for editing where possible and indicate status in file name or repository notes if supported (e.g., `_draft`, `_final`).
- Regularly review and archive obsolete files.
- Ensure file permissions and access rights comply with company data security policies.

6. Change Management

- This SOP is subject to regular review and updates.
- Changes will be communicated via email and updated on the company intranet.

7. Contacts

For questions or support on file naming and version control, contact it-support@company.com.