



## File Naming & Saving Projects Procedure

This File Naming & Saving Projects Procedure applies to all Employees of the business.

The objective of the policy is to establish expectations and processes for the electronic filing and saving of projects consistently throughout the organization.

The requirement is for all staff to comply with the File Naming & Saving Projects Procedure.

### Procedures

All files should be file in the following manner:

Therefore, whatever the job number is. File name to be as:

- Job Number – Lot Number OR Street Number - Street or Road Name - Suburb - NSW - Postcode
- Eg. XXXXX Lot 19 DP 241526 John Street Bankstown NSW XXXX - REV A
- Any issue that is to be superseded must be dated and filed within the job folder under file "Archive".
- "ARCHIVE" in our template sheets so the team is ready to use when required. Make sure you have the correct issue A, B, C, D ...



## Purpose

The purpose of this procedure is to establish guidelines and expectations for the file naming and saving projects.

## Objective

To ensure consistency, traceability, and ease of access for all project files, this policy outlines the standardized procedure for naming and saving project files within our organization.

## Policy Requirements

### File Naming Convention

All project files must be named following the specific format outlined below. This ensures that all files are easily identifiable and searchable by relevant project details.

#### Format:

Job Number – Lot Number OR Street Number - Street or Road Name - Suburb - NSW - Postcode - Revision

#### Example:

XXXXX Lot 19 DP 241526 John Street Bankstown NSW XXXX - REV A

### Detailed Components:

**Job Number:** Unique identifier for the job.

**Lot Number OR Street Number:** Specific lot or street number related to the project.

**Street or Road Name:** The name of the street or road where the project is located.

**Suburb:** The suburb in which the project is situated.

**NSW:** The state code (always NSW).

**Postcode:** The postal code for the location.

**Revision:** The current revision of the document (e.g., REV A, REV B, REV C, etc.).

### Superseded Issues

Any file that is to be superseded must be dated and filed within the job folder under a dedicated "Archive" subfolder. This ensures that previous versions of documents are preserved for reference without cluttering the current working directory.

#### Procedure:

**Date the Superseded File:** Include the date when the file was superseded in the filename.

**Move to Archive Folder:** Transfer the file to the "Archive" folder within the job directory.



### **Archive Template**

To facilitate this process, an "ARCHIVE" template has been created. This template is to be used by all team members when archiving files to ensure consistency.

#### **Steps:**

**Use the ARCHIVE Template:** When moving a file to the archive, ensure you use the correct template provided.

**Check Revision:** Make sure you correctly identify the revision as A, B, C, D, etc., when archiving.

### **Compliance**

Adherence to this policy is mandatory for all team members. Regular audits will be conducted to ensure compliance, and any deviations will be addressed promptly.

### **Review and Updates**

This policy will be reviewed annually to ensure it remains relevant and effective. Updates will be communicated to all team members as necessary.