**Copy File Naming Convention Guide**

**March 16, 2020**

**OVERVIEW**  
This document outlines the copy file and message naming convention that will be used by Digital production. Following this guide will help mitigate confusion about deliverable rounds and project status.

**COPY FILE NAMING STRUCTURE**

Client Name - Project Type - Identifying Topic - Round Number - Phase.doc

**Interpretation Key**

**Client Name:** The full or shortened name of the client.

**Project Type:** The type of project within the document or deliverable.

**Identifying Topic:** Helps identify which topic an item is. Particularly useful when there is more than one of the same type of collateral, like when there are two eBooks being produced simultaneously.

**Round Number:**

* R0: Initial draft, prior to the customer review.
* R1: Client has reviewed the initial draft and has provided feedback for revisions.
* R2: Client has reviewed the second draft and has provided more feedback.

**Phase:** Occurs after initial draft.

* QA EDITS: Edited version of the document. Will contain track changes and comments. Revisions needed. This is not the file to send to clients.
* FINAL: Incorporated the QA notes and edits. Will be a clean version of the document, with track changes accepted/denied and comments deleted. This is the file to send to clients, to design, or to the next step.
* CLIENT EDITS: Document includes client feedback. Managers who receive a Word document from the client with track changes or comments will rename the file accordingly and upload it to Clarizen.
* Rare variations:
  + Edited: Document has been QAed and track changes are accepted. Might be unsure of whether it needs to go to the next step or there is a question.
  + FINAL2: Document was edited beyond the FINAL stage, but before a round was over. Usually occurs when there are edits needed on top of the FINAL document posted.

**Examples and Their Interpretations:**

Sigma Solutions - Blog 12 - Cloud Security - R0 - QA EDITS.docx

Interpretation: This is Blog 12 in the Sigma series. It’s about Cloud Security, is in the drafting phase, and has been QAed. The client has not seen this document/project yet.

IBM - eBook - CFO - R1 - FINAL.doc

Interpretation: This is the CFO eBook produced for IBM (direct). It’s been through one round of client feedback. Because it has been through QA and has been finalized, it can now be sent for a second round of client feedback.

DSS - Newsletter - Disaster Recovery - R1 - CLIENT EDITS.docx

Interpretation: This is the newsletter for the client, DSS. The manager has received the client’s first round of feedback, which they provided inside of the Word document. Because the client reviewed it, the file includes R1 for the round. “CLIENT EDITS” indicates that these are the client’s notes. Upon loading this document, the copywriter will complete his/her R1 copy.

**Example Copy File Progression and Interpretation:**

All file edits should be made using Track Changes for clarity.

Pegasus – Blog - Data Compliance - R0.docx [writer’s initial draft, R0]

Pegasus – Blog – Data Compliance – R0 Strategist Edits.docx [strategist edits to R0]]

Pegasus – Blog – Data Compliance – R0 v2.docx [copywriter’s edits to R0]

Pegasus – Blog - Data Compliance - R0 - QA EDITS.docx [QA edits file, R0]

Pegasus – Blog - Data Compliance - R0 - FINAL.docx [final file, R0]

Pegasus – Blog - Data Compliance - R1 - CLIENT EDITS.docx [client edits, first round]

Pegasus – Blog - Data Compliance - R1.docx [post-client review, R1 edits made]

Pegasus – Blog - Data Compliance - R1 - QA EDITS.docx [post-client review, with QA edits]

Pegasus – Blog - Data Compliance - R1 - FINAL.docx [post-client review, all edits made]

Pegasus – Blog - Data Compliance - R2 - CLIENT EDITS.docx [client edits, second round]

Pegasus – Blog - Data Compliance - R2.docx [post-client review, R2 edits made]

Pegasus – Blog - Data Compliance - R2 - QA EDITS.docx [post-client review, with QA edits]

Pegasus – Blog - Data Compliance - R2 - FINAL.docx [post-client review, all edits made]