

**Design File & Message Naming Conventios Guide**

December 2016

Overview

This document outlines the file and message naming convention that will be used by the Creative Team. This document applies to design. Following this guide will help mitigate confusion about deliverable rounds and project status.

Message Posting Structure

The first person to post a message about the specific piece of content should start a Clarizen message defining the deliverable for a design project. All related deliverables and status messages should be contained within that thread to keep all related files and messages regarding approval/edits in the same place.

Design File Naming Structure

**ClientName\_ProjectType\_TitleOfPiece\_Round\_Phase.pdf (.eps, etc)**

*(Please note that design file names do not have spaces in them.)*

**Interpretation Key**

* **Client Name:** The full or shortened name of the client.
* **Project Type:** The type of project within the document or deliverable.
* **Title of Piece:** The title or headline of the item given in the copy.
* **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. The PDF will contain highlights and comments with changes. Revisions are needed. This is not the file to send to clients.
	+ **FINAL:** Incorporated the QA notes and edits. This is the clean version of the document, free of comments and highlights. This is the file to send to clients or the next step.
	+ **CLIENT EDITS:** Document includes client feedback. **Managers** who receive a marked-up PDF from the client will name 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:**

ArrowIBM\_eBook\_ArtofPersuadingCFO\_R0.pdf

Interpretation: This is the *Art of Persuading Your CFO* eBook for Arrow IBM. It is in the initial design draft phase. It will need to be QAed next. The client has not seen this document/project yet.

SigmaSolution\_SolutionBrief\_Education1to1\_R0-QA\_EDITS.pdf

Interpretation: This is the Solution Brief produced for Sigma Solutions about Education and 1:1 device ratios. This file has received QA edits and notes and is ready for the designer to process the QA Edits/finalization phase.

OxfordNetworks\_Infographic\_TurnTheCloudUp\_R1-FINAL.pdf

Interpretation: This is the cloud infographic produced for Oxford Networks. 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.

**Example Design File Progression and Interpretation:**

*Project Details: PEAK Resources’ eBook design with the title, “An IT Leader’s Guide to Recruiting Storage Professionals on LinkedIn”*

PEAKResources\_eBook\_ITLeaderGuideLinkedInRecruiting\_R0.pdf [initial draft, R0]

PEAKResources\_eBook\_ITLeaderGuideLinkedInRecruiting\_R0-QA\_EDITS.pdf [QA edits file, R0]

PEAKResources\_eBook\_ITLeaderGuideLinkedInRecruiting\_R0-FINAL.pdf [final file, R0]

PEAKResources\_eBook\_ITLeaderGuideLinkedInRecruiting\_R0-CLIENT-EDITS.pdf [client edits, first round]

PEAKResources\_eBook\_ITLeaderGuideLinkedInRecruiting\_R1.pdf [post-client review, R1 edits made]

PEAKResources\_eBook\_ITLeaderGuideLinkedInRecruiting\_R1-QA\_EDITS.pdf [post-client review, with QA edits]

PEAKResources\_eBook\_ITLeaderGuideToLinkedInRecruiting\_R1-FINAL.pdf [post-client review, all edits made]

PEAKResources\_eBook\_ITLeaderGuideLinkedInRecruiting\_R2-CLIENT-EDITS.pdf [client edits, second round]

PEAKResources\_eBook\_ITLeaderGuideLinkedInRecruiting\_R2.pdf [post-client review, R2 edits made]

PEAKResources\_eBook\_ITLeaderGuideLinkedInRecruiting\_R2-QA\_EDITS.pdf [post-client review, with QA edits]

PEAKResources\_eBook\_ITLeaderGuideToLinkedInRecruiting\_R2-FINAL.pdf [post-client review, all edits made]