

Documents and Folder Naming Convention

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VERSION	DATE	REVISION AUTHOR	SUMMARY OF CHANGES
1	17 Jan 2025	Anesa Basic	Initial version (documents long-standing Amida requirements)

Distribution

NAME	TITLE
All Amida Employees	

Approval

NAME	POSITION	SIGNATURE	DATE
Anesa Basic	MKT&KM Director	A.B.	1/17/2025

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Introduction

This policy establishes standardized folder and document naming conventions to ensure consistent organization, labeling, and storage of documents across Google Drive and SharePoint. When we follow these conventions, we improve document identification, searchability, and archiving, all while we enhance collaboration and knowledge-sharing across Amida and the knowledge management platform, iej.Amida.com. This policy applies to all documents, whether created internally or sourced externally, that Amida staff can easily locate and retrieve.

Documents covered under this policy include Word documents, PowerPoint presentations, Excel spreadsheets, graphics, videos, etc.

This policy includes the following key areas:

- Document Naming Conventions
- Folder Naming Conventions for Google Drive and SharePoint
- Document Storage and Management Guidelines

Document Naming Conventions

To ensure consistency and ease of access, all documents – whether for internal or external use – must adhere to Amida’s standardized naming conventions.

Naming Format for Amida-Generated Documents

- **Document name format:**
amida [document title] -[month] [day] [year] -[owner’s initials]
Example: amida marketing strategy -apr 5 2025 -js
- **Subsequent edits:**
Append the editor’s initials after the original owner’s initials
Round 1: amida [document title] -[month] [day] [year] -owner’s initials -editor’s initials
Round 2: amida [document title] -[month] [day] [year] -owner’s initials -editor’s initials -
second editor’s initials
Example: Round 1: amida marketing strategy -apr 5 2025 -js -ml
Round 2: amida marketing strategy -apr 5 2025 -js2 -ml

Naming Convention for Finalized Documents

- **Document name format:**
amida [document title] -[month] [year] -final
Example: amida marketing strategy -apr 2025 -final

Naming Convention for Drafts (Documents Not Finalized)

- **Document name format:**
draft amida [document title] -[month] [day] [year] -[owner’s initials]
Example: draft amida marketing strategy -apr 4 2025 -js

Naming Format for Non-Amida-Generated Documents

- **Document name format:**
[organization name] [document title] -[month] [day] [year]
Example: govwin annual report -apr 5 2025
- **Drafts:**
Append “draft” before the document title
Example: draft govwin annual report -apr 5 2025

Naming Conventions for Policy and Procedure Documents

- All policy and procedure documents must adhere to the established naming convention for policies; refer to [ADMN-PROC-07-1](#) for further details

General Document Title Rules

- Use descriptive file names that clearly convey the document's content; for project-related documents, include the client's name or abbreviation, project title, and document type (e.g., deliverable, presentation, status report)
- Use **lowercase** letters only in document titles
- Separate words with spaces and avoid dashes (-)
- Use **uppercase** letters for proper names, acronyms, and abbreviations (e.g., VA, DoD)
- Use the format: [month] [day] [year] (e.g., apr 5 2025)
- Use **lowercase** initials for both the owner and editor if applicable

Folder Naming Conventions for Google Drive and SharePoint

To ensure consistent organization and easy navigation, use a numbered folder system for Google Drive and SharePoint folders.

Folder Structure

- **Primary Folders:**
Begin with a number (e.g., 01, 02, 03)
Example: 01 – Companywide Resources; 02 – Customers
- **Main Archive Folder:**
Create a primary archive folder named “00 - archive” in each top-level Google Drive folder; store all archived documents in this folder

Subfolder Naming

- As needed, create subfolders based on document type, year, or project
Example: 01 - Marketing > 01 - Strategy Documents
- Use abbreviations in folder names where applicable (e.g., clients [VA, DoD, AI, etc.], projects [MCP, SDP, etc.])

Sequential Numbering

- Use whole numbers (e.g., 01, 02, 03) for folders

- Avoid the use of decimals (e.g., 1.1, 1.2)

Document Storage and Management Guidelines

To ensure effective document management, Amida utilizes **SharePoint** to collaborate on drafts and **Google Drive** to store finalized documents

Document Storage in Google Drive

- 1. Finalization:**
After approval or completion of a document, move the final version of the document to the Google Drive, which serves as the central repository for finalized content and knowledge assets
- 2. Collaboration on Editing:**
Use **SharePoint** exclusively for collaborative work on drafts and in-progress files; the Google Drive is reserved for final versions
- 3. Post-Project Updates:**
After project completion, update the project document names to align with Amida's naming conventions; then, move the project folder to the "Closed Projects" folder in Google Drive

SharePoint for Collaboration

- **Primary Purpose:**
SharePoint is solely for collaboration on drafts, working documents, and in-progress files
- **Final Documents:**
Once you finalize the documents, store them in Google Drive for permanent archiving and to ensure easy accessibility through the knowledge management platform
- **SharePoint Folder Naming:**
Use the same naming conventions for both SharePoint and Google Drive folders; see "Folder Naming Conventions for Google Drive and SharePoint" above for more information

Review and Compliance

The Marketing & Knowledge Management Department will review this policy periodically to confirm that it meets Amida's document management needs as they evolve. All employees and contractors must comply with these naming conventions and folder organization rules. Project Managers, Functional Managers, Directors, and Leadership are responsible for ensuring compliance and for informing their teams about these guidelines.