
CAD File Management and Naming Convention Policy

1.0 Policy Objective & Scope

The objective of this policy is to establish a standardized workflow for the creation, naming, storage, version control, and archival of all CAD files used in cabinet and millwork manufacturing. This ensures file integrity, traceability, and efficient collaboration across engineering, production, and project management teams.

This policy applies to all employees, contractors, and third-party designers who create, modify, or manage CAD files for any project within the company. It covers all native CAD files (e.g., .dwg, .dxf, .ipt, .iam, .sldprt, .sldasm) and associated export files (e.g., .pdf, .stp, .iges).

2.0 Roles & Responsibilities

- **Engineering Manager:** Responsible for final approval of all CAD file naming conventions, version control protocols, and archival procedures. Conducts quarterly audits of file management compliance.
- **CAD Designer / Drafter:** Responsible for creating and modifying CAD files in strict adherence to the naming convention and version control rules. Must save files only to the designated network drive or cloud repository.
- **Production Supervisor:** Responsible for ensuring that production teams access only the latest approved CAD files from the master project folder. Halts production if file discrepancies are identified.
- **Project Manager:** Responsible for initiating new project folders and ensuring all CAD files are correctly named and archived upon project completion.
- **IT Administrator:** Responsible for maintaining the network storage structure, access permissions, and backup schedules for CAD file repositories.

3.0 Core Rules & Guidelines

- All CAD files must adhere to the standard naming format: ProjectCode_Assembly_Part_Revision_Date. Example: PRJ123_CAB_DRW_R02_20260704.
- Project codes must be assigned by the Project Manager and remain consistent across all files for a given project.
- Revisions must be sequential starting from R01. Revisions are incremented only after formal Engineering Change Notice (ECN) approval.
- Dates must be in YYYYMMDD format to ensure chronological sorting.
- No spaces are allowed in file names. Use underscores or hyphens as separators.
- All CAD files must be saved to the designated network drive (e.g., \\server\projects\CAD) or approved cloud repository. Local desktop saves are strictly prohibited.
- Only the latest approved revision of a file shall be marked as 'Current'. All previous revisions must be moved to an 'Archive' subfolder within the project directory.

- Export files (PDF, STP, etc.) must include the same base name as the source CAD file, appended with the export format (e.g., PRJ123_CAB_DRW_R02_20260704.pdf).

4.0 Step-by-Step Workflow

1. Project Manager creates a new project folder on the designated network drive using the standard naming format: ProjectCode_ProjectName_StartDate.
2. Project Manager assigns a unique project code and communicates it to the engineering team via the project kickoff meeting or email.
3. CAD Designer creates the initial CAD file(s) following the naming convention: ProjectCode_Assembly_Part_R01_YYYYMMDD.
4. CAD Designer saves the file to the 'Current' subfolder within the project directory. No other save locations are permitted.
5. CAD Designer submits the file for review via the ShopDocs digital portal, attaching a PDF export for markup.
6. Engineering Manager reviews the file for design accuracy, adherence to standards, and naming compliance. If revisions are needed, the file is returned with comments.
7. Upon approval, the Engineering Manager marks the file as 'Approved' in ShopDocs and notifies the Production Supervisor.
8. If a design change is required after approval, the CAD Designer initiates an Engineering Change Notice (ECN) through ShopDocs.
9. Once the ECN is approved, the CAD Designer increments the revision number (e.g., R02) and updates the file name accordingly. The old file is moved to the 'Archive' subfolder.
10. The updated file is saved to the 'Current' subfolder, and the Engineering Manager re-approves it in ShopDocs.
11. Upon project completion, the Project Manager ensures all final CAD files are archived in the 'Archive' subfolder and that the project folder is backed up by IT.
12. IT Administrator performs a monthly backup of the entire CAD repository and verifies file integrity.

5.0 Documentation & Compliance

All CAD files and associated documentation (ECNs, approval sheets, markups) must be stored in the designated network drive or cloud repository. The master project folder must contain subfolders for 'Current', 'Archive', and 'Exports'.

- **Approved CAD files:** Stored in the 'Current' subfolder of the project directory on the network drive.
- **Archived revisions:** Moved to the 'Archive' subfolder within the same project directory.
- **ECN records and approval sheets:** Uploaded to the ShopDocs portal and linked to the project.
- **Compliance audits:** Conducted quarterly by the Engineering Manager. A random sample of 10% of active project folders is reviewed for naming convention adherence, version control accuracy, and proper archival.
- **Non-compliance:** First offense results in a written warning and retraining. Second offense escalates to a formal performance improvement plan.

Regulatory Disclaimer: This document is a generic policy and workflow template. The end-user assumes all liability for validating all procedures, roles, and administrative guidelines against actual organizational structures before formal implementation.