

Standard Operating Procedure (SOP)

Folder Structure Creation and Naming Conventions

This SOP details the standardized **folder structure creation and naming conventions** to ensure organized, consistent, and easily retrievable digital file management. It covers the principles for creating hierarchical folder systems, the rules for naming folders to maintain clarity and uniformity, version control, and best practices to enhance collaboration and minimize errors across teams and departments.

1. Purpose

To establish a uniform folder structure and naming convention facilitating efficient file organization, quick retrieval, and collaboration across all teams and departments.

2. Scope

This SOP applies to all staff, departments, and teams managing digital files and folders on the company's shared drives and collaboration platforms.

3. Responsibilities

- All Employees:** Adhere to this SOP when creating and managing folders.
- Department Heads:** Ensure team compliance and provide guidance as required.
- IT/Admin:** Support and implement folder structure, monitor compliance.

4. Standard Folder Structure

- Top-level Folders** (e.g., Departments, Projects, Years)
 - Each department/project should have a dedicated top-level folder.
 - Examples: `Finance`, `HR`, `2024_Projects`, `Marketing`
- Subfolders**
 - Organize by function, project, date, or document type as needed.
 - Examples:
 - `Finance/Invoices/2024`
 - `Marketing/Campaigns/2024_Q1`

Sample Structure

```
/Department
  /Project_Name
    /YYYY_MM_DD_MeetingNotes
    /DocType
```

5. Folder Naming Conventions

- General Rules:**
 - Use descriptive names that reflect content/purpose.
 - Use `_` (underscores) or `-` (hyphens) instead of spaces.
 - Start with the most significant identifier (Year, Project, Client, etc.).
 - Use consistent date formatting: `YYYY-MM-DD` or `YYYY_MM_DD`.
 - No special characters (`/\ : * ? " < > |`).
 - Limit folder name length to 30 characters where possible.
 - Use Title Case, e.g., `Client_ProjectName_2024`.

Element	Format	Example
Date	YYYY-MM-DD	2024-06-01
Project	ProjectName	WebsiteRedesign
Type	Type/Function	Reports, Invoices, Assets

Version	vX.X	v1.0, v2.1
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6. Version Control

- Add version number at the end of the folder or file name as appropriate.
- Format: `v1.0` , `v2.0` , etc.
- For draft/review status, append: `_DRAFT` or `_REVIEW`
- Example: `Proposal_2024-06-01_v1.0`

7. Best Practices

- Do not create unnecessary layers of folders ("folder sprawl").
- Perform annual reviews and archive outdated folders.
- Document new naming conventions or exceptions in a shared resource.
- Communicate any structural changes to affected teams.
- Grant access according to data sensitivity and role-based requirements.

8. Examples

- `HR/Recruitment/2024/Job_Postings`
- `Finance/Reports/2023_Q4/Final`
- `Projects/ABC_Client/2024-06-01_KickoffMeeting_Notes`
- `Marketing/Campaigns/2024_Summer_SocialMedia/v1.0`

9. Review and Updates

- This SOP will be reviewed annually and updated as needed to reflect changes in technology or business process.

Document Owner: [Your Department/Name]
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