

SOP: Folder Structure Setup and Maintenance Guidelines

This SOP details the **folder structure setup and maintenance guidelines**, covering the organization, naming conventions, access permissions, version control, periodic review, backup procedures, and archiving protocols. The guideline ensures consistent and efficient data management, easy retrieval, enhanced collaboration, and secure storage of digital files across the organization.

1. Purpose

To ensure all digital files are systematically managed, easily retrievable, securely stored, and maintained efficiently through a standardized folder structure protocol.

2. Scope

This SOP applies to all digital folders and files managed and stored within the organization's shared drives, network storage, or cloud storage solutions.

3. Folder Organization Structure

- **Top-Level Structure:**
 - Department or Function (e.g., HR, Finance, Projects, Sales)
 - Year or Period (e.g., 2024, Q1_2024)
 - Project or Subject (e.g., Project_Alpha, Recruitment_2024)
- **Sub-Level Structure:**
 - Document Types (e.g., Reports, Templates, Correspondence)
 - Temporary/Archived Folders as needed

4. Naming Conventions

- Use clear, descriptive, and consistent names.
- Separate words with underscores (`_`), avoid spaces and special characters.
- Use dates in `YYYYMMDD` format where applicable.
- Example: `Sales_2024_Q1_Report_V1.0.pdf`

5. Access Permissions

- Define access at the top-level folder and inherit to subfolders where possible.
- Access rights:
 - **Read Only:** For most users
 - **Edit:** For responsible staff or teams
 - **Admin:** For IT/admin roles
- Review and update permissions quarterly or as roles change.

6. Version Control

- Always save editable files with a version number (e.g., `V1.0`, `V1.1`, `V2.0`).
- Retain final versions with "FINAL" in the filename (e.g., `Proposal_20240601_FINAL.pdf`).
- Older versions may be moved to an "Archive" subfolder as needed.

7. Periodic Review

1. Conduct a folder review every 6 months.
2. Remove obsolete or redundant files.
3. Reorganize misplaced files/folders according to current structure.
4. Document the review and actions taken.

8. Backup Procedures

- Schedule automated backups daily for critical folders; weekly for general folders.
- Test backup restoration process quarterly.
- Store at least one backup copy offsite/cloud.

9. Archiving Protocol

- Move completed projects/folders not in active use to an **Archive** folder.
- Set up restricted access for archives to prevent accidental changes.
- Archive folders should remain for a minimum of 2 years (or as per regulatory requirements), after which they can be reviewed for deletion.

10. Roles and Responsibilities

Role	Responsibilities
Department Heads	Ensuring adherence to the folder structure and periodic reviews
IT/Admin Team	Managing permissions, performing backups, supporting organization-wide consistency
All Staff	Following guidelines for folder/file creation, naming, and storage

11. References

- Company Data Management Policy
- IT Security Guidelines

12. Revision History

Version	Date	Description	Author
1.0	2024-06-10	Initial release	[Your Name]