Standard Operating Procedure (SOP)

File Organization, Data Backup, and Digital Archiving Standards

This SOP details **file organization, data backup, and digital archiving standards** to ensure consistent data management practices. It covers systematic naming conventions, folder structures, regular backup schedules, secure storage solutions, and long-term digital preservation methods. The objective is to maintain data integrity, prevent loss, and facilitate easy retrieval of digital information across the organization.

1. File Organization

- **Naming Conventions:**
  - Use clear, descriptive names including relevant information (e.g., project, date, version).
  - Avoid spaces; use underscores (_) or dashes (-).
  - Include dates in `YYYYMMDD` format.
  - Examples:
    - `ProjectName_DocumentType_20240601_v01.docx`
    - `MarketingReport_Q1_2024_FINAL.pdf`
- **Folder Structure:**
  - Organize hierarchy by department, project, or year as appropriate.
  - Top-level folders should reflect organizational units or project names.
  - Create subfolders for document types (e.g., `Reports`, `Contracts`, `Data`).
- **Version Control:**
  - Maintain version tracking in filenames using `v01`, `v02`, etc.
  - Keep only the latest two versions in active folders; archive or delete older versions as per policy.

2. Data Backup

- **Backup Schedule:**
  - Perform automatic daily incremental backups.
  - Full system backups at least once per week.
- **Backup Storage:**
  - Store backups in at least two separate physical or cloud locations.
  - Encrypt all backup files and protect with strong access controls.
- **Restore Testing:**
  - Test backup recovery at least quarterly to ensure data integrity.

3. Digital Archiving

- **Archiving Criteria:**
  - Archive files that are no longer active but must be retained (e.g., compliance, reference).
  - Follow retention schedules per legal/regulatory requirements.
- **Archiving Process:**
  - Move eligible files to dedicated archive folders or systems.
  - Convert to stable file formats for long-term preservation (e.g., PDF/A, CSV, TIFF).
  - Document date of archiving and retention period.
- **Storage Medium:**
  - Store archives on reliable, redundant media (cloud storage, external drives, or enterprise systems).
  - Maintain at least two independent copies of all archives.
- **Access Control:**
  - Restrict access to archived data to authorized personnel only.

4. Roles and Responsibilities

Role	Responsibility
Department Leads	Oversee implementation and compliance with this SOP.
IT Staff	Set up and maintain backup and archiving systems; support end users.
Employees	Follow naming, folder, and storage standards; report any incidents.

5. Review and Revision

- This SOP will be reviewed annually.
- Revisions will be made as needed to address new technologies, risks, or business requirements.

6. References

- Company Data Management Policy
- Applicable legal/regulatory requirements
- IT Security Guidelines