

FILE MANAGEMENT

STANDARD OF OPERATION

Department	Operations	Effective Date	2024-05-01
Owner	Operations Manager	Review Frequency	Quaterly

PURPOSE & SCOPE

Ensure all business files are stored consistently, securely, and are easy to locate.
Applies to internal documents, client files, SOPs, finance records, and marketing assets.

FILE NAMING RULES

All files must follow the format below. Consistent naming enables instant identification and prevents version confusion.

FORMAT:[Department]-[YYYY-MM-DD]-[Description]-v1 EXAMPLE: OPS-2024-07-14-Meeting-Notes-v1

Rule	Requirement	Example
Dept Code	2-4 uppercase letters for your department	OPS, MKT, FIN, HR
Date	ISO format: YYYY-MM-DD	2024-07-14
Description	Title-Case words, hyphens instead of spaces	MEETING-NOTES
Version	Append -v1, - v2 ... on each revision	-v2
Characters	No spaces, special chars, or abbreviations beyond the dept code	No &, #,%!,

FOLDER STRUCTURE & STORAGE

- Store all work files in the approved shared drive, never on local desktops or personal cloud accounts.
- * Follow the hierarchy: /Department → Year → /Project or /Topic → files.

VERSION CONTROL

Never overwrite files. Use v1, v2, v3, and archive older versions.

PERMISSIONS

Assign View, Comment, Edit or Owner access based on responsibilities.

MONTHLY MAINTENANCE

- Remove duplicates
- Archive inactive projects
- Review permissions
- Ensure naming consistency

BEST PTRACTICES

- No desktop storage
- No duplicate folders
- No vague file names
- Every file belongs in an approved folder