[Company name]

*How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue **[field]** until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.*

Document Filing SOP

Purpose: Keeping paper and digital files findable: one naming rule, one folder structure, and one retention rule for the whole team.

Who this is for: Everyone who saves, files, or retrieves office documents.

Naming convention

Name every file as:

[YYYY]-[MM]-[DD]_[Project or topic]_[Document title]_v[Version number]

Use hyphens between words, never spaces or special characters. Increase the version number (v2, v3) for each revision instead of adding words like FINAL.

Dates always use year-month-day order so files sort chronologically.

Folder structure

Save working documents in **[Shared drive / system]** from the start, never on a personal desktop or downloads folder. Archive folders in **[Archive location]** are read-only: to revise an archived document, copy it to the current folder and raise the version number.

*Write the folder path each top-level folder lives in, within **[Shared drive / system]**:*

Top-level folder	Folder path
Clients	
Finance	
HR	
Operations	
Legal	

[Company name]

Filing steps

1. Save the document with the correct name and file type (Word for editable drafts, PDF for issued versions).
2. File it in the correct folder and check it opens from that location.
3. If the document relates to a second topic, add a shortcut or cross-reference note rather than saving a second copy.
4. Tell the document owner it has been filed, with the folder path.

Retrieval steps

1. Search by the naming pattern first (date, then project, then title) before using keyword search.
2. If a document is not found in 10 minutes, ask **[Records lead name]** instead of recreating it.
3. Never edit a document retrieved from the archive; request a current copy from the owner.

Retention and archiving

Document type	Keep for	Then
Invoices and receipts	7 years	Secure destruction
Employment contracts	Duration of employment + 6 years	Secure destruction
Meeting minutes	3 years	Archive

The first three rows are examples - replace them with your own document types.

Completion checklist

✓	Filing check
	Today’s documents are named correctly and filed in the shared structure, not on personal desktops.

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✓	Filing check
	No duplicate copies were created; cross-references were used instead.
	Documents due for archiving or destruction were handled under the retention rule.

Checked by: **[Name]** - Date: **[DD Month YYYY]**

Document	Document Filing SOP
Version	1.0
Owner	**[Name and role]**
Review date	**[DD Month YYYY]**