



Records Management Guidance

Folder Structures

This guidance document includes best practices and other considerations for folder structures in **all places** where records might be stored, including, but not limited to: Content Manager, Outlook, SharePoint, Teams, OneDrive, shared/network drives, and even physical folders in boxes or filing cabinets.



Best practice

- Keep the folder structure as **simple** as possible (don't overcomplicate it).
- **Avoid using subfolders** (if you must use subfolders, limit to just one or two layers).
- Crosswalk to retention categories (ideally, each parent folder and all contents should be from the same retention category on your [retention schedule](#); and you should be able to apply a cutoff date according to the cutoff/retention language on the retention schedule).
- Use the same folder structure in all places you manage the same records.
- Use **naming conventions** for all folder titles (see more below).

Folder title naming conventions

- Get **buy-in** and choose conventions that your team can get behind.
- Avoid lengthy **folder titles**; keep them **short, but meaningful** (stay under 50 characters)
- Avoid typos or acronyms that might change.
- Consider how people search for or locate the records; order elements of the folder title based on what is most important (remember that what you start the folder title with will allow you to sort by that word).
- If you have multiple words or numbers, do **not** use "Camel Case" (i.e. ProjectInvoices), instead use spaces, hyphens or underscores (hyphens or underscores are preferred in SharePoint or Teams).
- Also consider document naming conventions and how those will relate to folder titles (for more information, view [document naming conventions](#) guidance).

Documentation and maintenance

- Regardless of what you decide, ensure that the folder structure is **documented**. Options include a [file plan](#) or other [standard work documentation](#).
- Ensure that the documentation about folder structures is shared with staff and continues to be available.
- Ensure that individual staff or roles are assigned to maintain the file plan or folder structure over time.



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