



Archiving Policy

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Purpose

This Standard Operating Procedure (SOP) outlines the procedure for archiving documents at Mercy Hands in the Google Drive. It ensures that all departments properly organize and store their documents, with specific provisions for project-related documents.

Responsibilities

- **Executive Secretary:**
 - Creates project folders in the Google Drive when a project is approved for funding.
 - Grants 'edit' level access to project staff (program manager, finance officer, MEAL officer, HR manager, and procurement director).
 - Approves requests for 'edit' level access to subfolders.
- **Departments:**
 - Responsible for archiving their respective documents in the designated folders within the Google Drive.
 - Ensure that all documents are appropriately named and categorized.
- **Staff Involved in Project Implementation:**
 - Create sub-folders within the project folder that are relevant to their roles in the project.
 - Store all relevant project documents in their respective sub-folders.

Procedure

1. **Project Approval:**
 - Upon approval of a project for funding, the Executive Secretary creates a folder in the Google Drive dedicated to that project.
2. **Access Permissions:**
 - The Executive Secretary grants 'edit' level access to the program manager, finance officer, MEAL officer, HR manager, and procurement director involved in the project.
3. **Sub-folder Creation:**
 - The involved staff create sub-folders within the project folder that correspond to their roles in the project (e.g., "Finance," "HR," "Procurement," etc.).
4. **Document Archiving:**
 - Departments are responsible for archiving their documents in the designated folders within the Google Drive.
5. **Software Integration:**
 - Finance, HR, asset management, and procurement documents should be archived in their respective software systems (SAGA, WebHR, Asset Manager,



Precoro) whenever possible. If documents cannot be archived in these systems, they must be stored in the Google Drive.

6. Access Control:

- Staff may grant 'view' level access to their sub-folders to others as needed. However, granting 'edit' level access requires approval from the Executive Secretary.

7. Data Security Compliance:

- All archiving activities must comply with the Data Security and Protection Policy of Mercy Hands.

Project Folder Indexing System

An effective project folder indexing system is crucial for efficient document management and retrieval. Mercy Hands adopts the following project folder indexing system:

[Program Dept. Code]_[Project Code]_Starting Year_[Program Support Dept. or Activity Code]

The project code is decided by the Program Manager. Reference codes for program departments and program support departments/ activities can be found in Annex 1.

For any subsequent sub-folder, it should maintain the same title as the higher-level folder, followed by a term that describes the sub-folder's content. For instance, if the higher-level folder is *PD_[project code]_2022_Nr*, and you wish to create a sub-folder for meeting minutes, the sub-folder title should be *PD_[project code]_2022_Nr_MoM*.

Training and Awareness

The Executive Secretary is tasked with conducting training sessions for the staff regarding these archiving procedures. All team members will undergo training on these procedures as part of their onboarding process and will receive annual reminders.

Access to Google Drive

Every July and December, the Executive Secretary will provide a comprehensive list of individuals who have access to Mercy Hands' Google Drive, specifying their respective levels of access. Additionally, recommendations to modify or revoke access will be included.

Furthermore, the Executive Secretary should conduct routine checks of individual folders within the drive to ensure they are actively and appropriately updated.



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Record Keeping

All documents will be permanently archived in Google Drive and may only be deleted with the explicit approval of the Executive Director.

The original hard copies of the documents will be securely stored in a designated safe location for a period of seven years, unless otherwise specified by the donor. Any disposal of these documents will be overseen by a committee appointed by the Executive Director.

Non-Compliance

The Executive Secretary shall report instances of non-compliance with these archiving procedures to the Executive Director for appropriate action.

Revision of Archiving Procedures

The Executive Secretary shall review this SOP annually or as needed to ensure its effectiveness and relevance. The Executive Secretary shall submit any suggested modifications to the Executive Director for approval.



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Annex 1 Reference Codes

Program Dept. Code		Program Support Dept./ Actiity Code	
Department	Code	Department/ Activity	Code
Education & Behavioral Change	EBC	Finance	Fi
Livelihood	LI	MEAL	Me
Protection & Democracy	PD	Procurement	Pr
Emergency Response	ER	HR	Hr
Health & Nutrition	HN	PR & Comm.	Pc
WASH	WA	Logistics & Security	Ls
Research	RE	Narrative Reports	Nr
Community Development	CD	Project Agreement	Pa

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