EMPOWERING WOMEN
FOR DIGITAL & REMOTE HR CAREERS

MODULE 2 · COMMUNICATION AND COLLABORATION · LESSON 2.4

Documents, versioning and shared workspaces

Where HR information actually lives — and the small decisions that determine whether anyone can find it in two years.



1.25 training hours · Building the basics · RemoteHeR

WHAT THIS LESSON COVERS

Five things, in order

- Folder architecture for an HR function — what lives where
- Naming conventions and version control that survive several editors
- Permissions: who sees what, and the risk of open link sharing
- Co-editing etiquette — comments against edits, and keeping an audit trail
- Retention: what to keep, for how long, and what to delete



The cost of a bad shared drive is invisible, which is why nobody fixes it.

Nobody logs the twenty minutes they spent looking for the current offer letter template, or the version they used because they could not find the newer one.



Time spent searching for a file is time nobody counts.

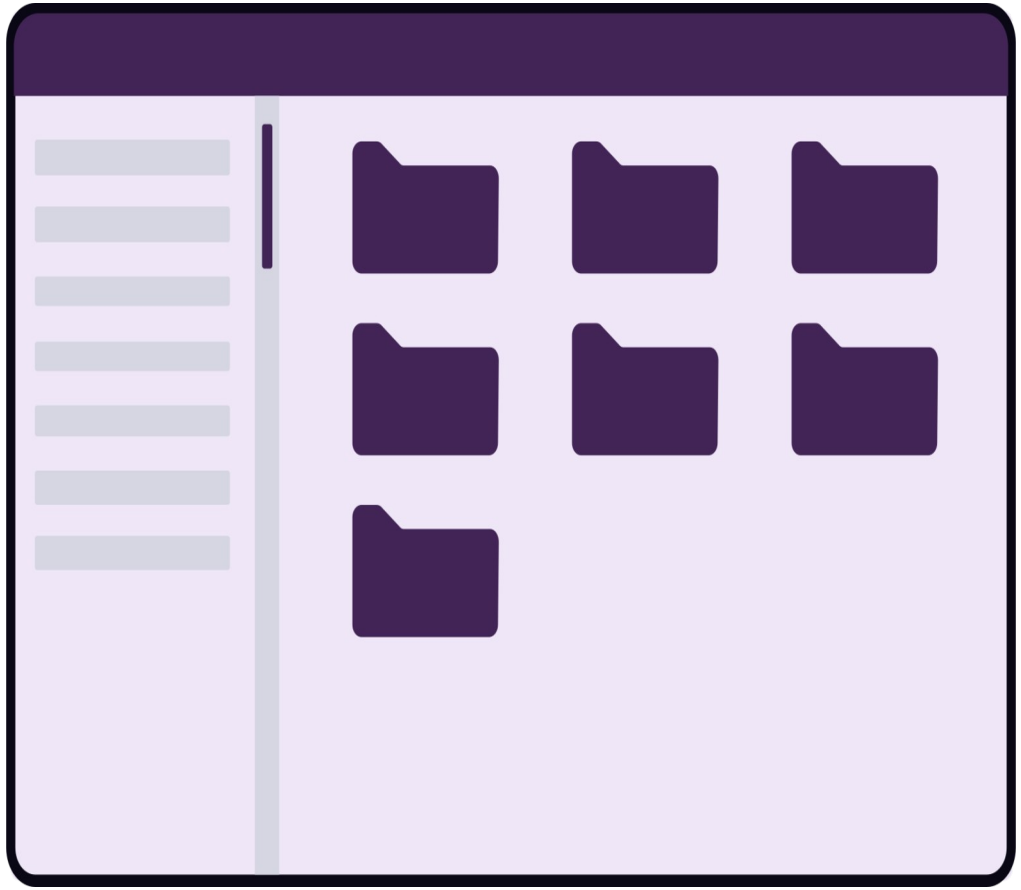
HR is worse than most functions for this. Its documents are shared between people who each organise differently, and many cannot simply be searched — they are restricted, and the person who knows where they are is on leave.

ARCHITECTURE

Organise by what, not by when

The single most useful principle: structure by subject, not by year or by person.

- Recruitment, Policies, Employee files.
- Not 2024, 2025, Ana's folder.
- Subjects recur. Years and people do not.



A WORKING STRUCTURE

Four top-level folders is usually enough

01 Recruitment

Job descriptions, adverts, interview guides, scoring matrices. Templates at the top, live vacancies in dated subfolders beneath them.

02 Policies and templates

The current version of everything, and nothing else. Superseded versions move to an archive folder rather than sitting alongside.

03 Employee files

One folder per person, permissions restricted, and never on a drive anyone can browse. Often this belongs in the HR system rather than a shared drive at all.

04 Team and projects

Working documents, meeting notes, the things that are in progress. The only folder where mess is acceptable, because it is temporary.

NAMING

The file name is the version control

⚠ Unusable

- Offer letter FINAL.docx
- Offer letter FINAL v2.docx
- Offer letter FINAL v2 ANA EDIT.docx
- Offer letter FINAL v2 ANA EDIT (1).docx
- Copy of Offer letter FINAL USE THIS ONE.docx

Sortable and clear

- 2026-01-12 Offer letter template v3.docx
- Date first, so the folder sorts itself chronologically
- One version number, incremented, never "final"
- Initials only where two people genuinely worked in parallel
- Superseded versions moved to /archive, not renamed

VERSIONS

Surviving several editors

1. **One document, many editors — not many copies**

   Co-editing in SharePoint or Google Drive removes the whole problem. Downloading, editing and re-uploading recreates it.

2. **Increment the version when it changes meaning**

   A typo fix is not a new version. A changed notice period is. Version numbers should mark decisions, not keystrokes.

3. **Keep a change note at the top**

   Three lines: what changed, when, and who approved it. It is the difference between a document and a policy.

4. **Archive rather than delete**

   You will need to show what the policy said in March. Move the old version, do not overwrite it.

THE AUDIT TRAIL

What version history gives you

Who changed what, and when

Both SharePoint and Google Drive keep this automatically. Most people never look at it and it answers half the arguments about a document.

The ability to restore

Someone will overwrite something important. Version history means that is an inconvenience rather than a disaster.

Evidence the process was followed

In a dispute, being able to show when a policy changed and who approved it is worth more than the policy itself.

A reason not to work in copies

The moment someone downloads, edits and re-uploads, the history breaks. That is the real cost of passing files around by email.

Anyone with the link means anyone.

It means forwarded, indexed, and readable by someone who left last year. For an HR document it is almost never the right setting.



PERMISSIONS

Four questions before you share

Who needs it, precisely

Name people or a group. If you cannot say who should see it, you are not ready to share it.

View or edit

Most people need to read. Edit access is for people who are actually going to change the document, which is usually two of them.

For how long

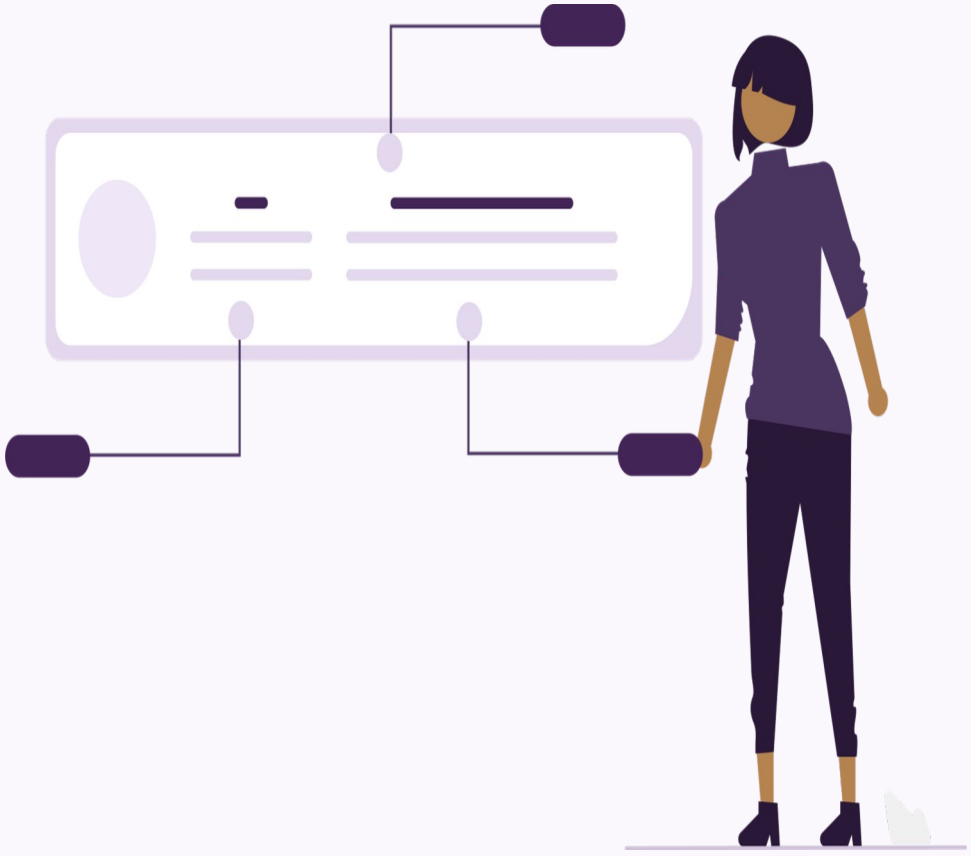
Set an expiry on anything shared outside the organisation. Recruitment links especially — a shortlist should not stay live for a year.

What is in the folder above

Sharing a folder shares everything in it, including what someone adds tomorrow. Share the file unless you mean the folder.

Employee files are not shared-drive material.

Contracts, medical notes, disciplinary records. Restricted access, an audit trail, and ideally inside the HR system rather than a folder anyone can browse.



IN PRACTICE

The link that went too far

You share a shortlist spreadsheet with a hiring manager using "anyone with the link can edit". Three weeks later a candidate emails: a friend forwarded them the link, and they can see every applicant's name and score.

What good looks like

- Revoke the link immediately, before anything else. Every minute it stays live widens the disclosure.
- Tell whoever is responsible for data protection today. This is a personal data breach and there may be a 72-hour reporting deadline.
- Establish who actually accessed it. Most tools keep an access log — that log is the difference between a guess and a report.
- Tell the affected candidates. They will find out, and hearing it from you is materially better.

CO-EDITING

Comment or edit

Edit directly when

- It is a working draft and you are one of the authors
- The change is factual — a wrong date, a broken link
- You have been asked to make the change
- The document is yours to own

Comment instead when

- It is someone else's document
- The change is a matter of judgement rather than fact
- It affects meaning, tone, or a commitment
- It is a policy, where the change history matters
- You are not certain — a comment is always recoverable

RETENTION

Keep, archive, delete

Keep while it is needed

Employee records for the duration of employment and a defined period after. The period differs by country — Module 6 covers it.

Archive when it is superseded

Old policy versions, closed vacancies, previous templates. Out of the working area, still retrievable if someone asks.

Delete when the basis has gone

Unsuccessful applicant data after the retention period. Keeping it "just in case" is not a lawful basis, and it is a common finding in audits.

Never delete during a live case

If a grievance, tribunal or investigation is running, deletion can look like concealment even when it was routine housekeeping.

STARTING FROM A MESS

Fixing a drive that is already bad

1. **Do not reorganise everything at once**

   Build the new structure alongside the old one and move things as you touch them. A big-bang reorganisation loses files and goodwill.

2. **Start with the templates**

   They are used most often and cause the most damage when wrong. One folder, current versions only, and tell people where it is.

3. **Freeze the old area, do not delete it**

   Rename it _ARCHIVE and make it read-only. Nothing is lost, and nobody keeps adding to the mess.

4. **Write the convention down in the folder**

   One page at the top level, so the person who joins next year inherits the system rather than guessing at it.

Tools you will see used

SharePoint or OneDrive

Where Microsoft-based HR functions keep documents. Version history is built in.

Google Drive

Strong co-editing and comments. Watch the link-sharing defaults.

Naming convention sheet

The one-page template you will fill in during the activity.

Free tiers are enough for everything in this lesson.

NOW IT IS YOUR TURN

Fix the shared drive

Reorganise a real HR drive that has got out of hand

You are given a folder listing with duplicate templates, four versions of one policy, an over-shared shortlist and misplaced employee files. Produce the structure, the naming convention and the permissions.

It feeds into

Outcome 4, and the confidentiality habits your pack is judged on. The convention is not a piece of the pack.

No mark

Your tutor reads it and replies in writing. Activities carry no mark: only the module test and the artefact have a result.

RECAP

Before you move on

- Organise by subject, not by year or by person. Subjects recur; years and people do not.
- Date first, one version number, never the word "final". Archive rather than rename.
- "Anyone with the link" means forwarded, indexed, and readable by someone who left last year.
- Comment on other people's documents; edit only what is yours or plainly factual.
- Never delete anything while a grievance, tribunal or investigation is live.

Next: take the knowledge check. It is never graded, you have unlimited attempts, and every option comes with feedback.

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Lesson 2.4 complete

Do the shared drive activity and the knowledge check. Lesson 2.5 is the last one — communicating with empathy at a distance.

Erasmus+ 2025-1-PT01-KA220-VET-000365831

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