File naming and permissions

Apply it in Activity 2.4, then pin it at the top of any drive you look after.

Folder structure

The principle

Organise by subject, not by year or person. Subjects recur; years end and people leave.

Folder	What lives here	What does not
01 Recruitment	Templates at the top; live vacancies in dated subfolders	Candidate data beyond the retention period
02 Policies and templates	The current version of everything	Superseded versions — those move to _ARCHIVE
03 Employee files	One folder per person, permission-restricted	Anything that belongs in the HR system instead
04 Team and projects	Working documents, meeting notes	Anything final — it moves to its subject folder
_ARCHIVE	Superseded versions, closed vacancies	Anything current

File names

Rule	Example
Date first, year-month-day, so the folder sorts itself	2026-01-12 …
Then what it is, in words someone would search for	… Offer letter template …
Then one version number that increments. Never "final"	… v3.docx
Initials only where two people worked in parallel	… v3 AS.docx
What this replaces	Offer letter FINAL v2 ANA EDIT.docx

Permissions

Before you share, ask	Default answer
Who needs it, precisely?	Named people or a group. Never "anyone with the link" — it gets forwarded
View or edit?	View. Edit is for the two people actually changing it
For how long?	Set an expiry on anything shared outside the organisation
The file or the folder?	The file, unless you mean everything added to that folder in future

Retention

State	What it means	Example
Keep	Needed now, and for a defined period	Employee records during employment
Archive	Superseded but retrievable	Last year's policy version
Delete	The lawful basis has gone	Unsuccessful applicant data after the retention period
Do not touch	A grievance or investigation is live	Everything on that case. Never delete it

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