

Where a new thing goes

A place for each kind of agent information. Find the existing home before you add a file, a rule, or another copy.

01

One-time request

The current task or approved work brief.

02

Standing rule

The instruction file your agent actually reads.

03

Voice choice

The loaded voice guide, if your setup has one.

04

Repeat procedure

An existing skill or process guide.

05

Project fact or result

The project's current record or evidence folder.

06

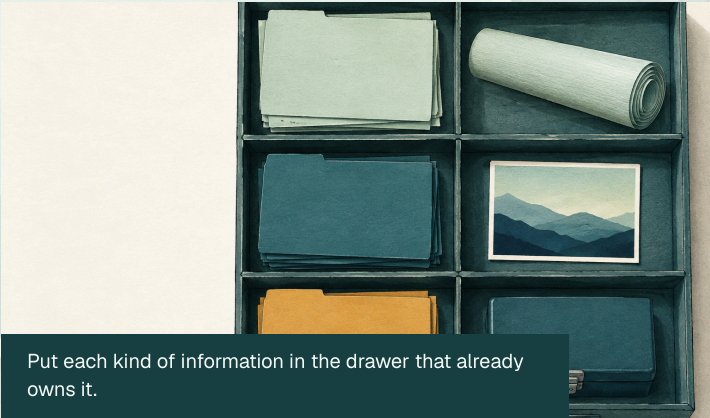
Secret or private data

The approved secure store, never a job file.

A tidy folder isn't the whole goal

The right person or agent must be able to find the right version. A new file that nobody reads can be neat and still useless.

This guide helps you sort information after your build is live. It doesn't ask you to change the system's folders or add new software.



CHOOSE A HOME	PAGE
Ask the three routing questions	2
Understand the filenames without guessing their behavior	3
Keep standing rules and voice choices separate	4
Place a repeat procedure	5
Store facts, tasks, results, and secrets safely	6
Request a new automated job	7
Check that the new item can be found	8

Ask three questions before filing.

Name what the new item does. Its home follows from its job, not from the most impressive filename.

01

Does it last?
Only this task: keep it with the task.

▼

02

What kind is it?
Rule, voice, procedure, fact, result, or secret?

▼

03

Who already owns it?
Find the current source and its owner.

If the answer is unclear, keep a draft request. Don't invent a new folder.

Start with the handoff map
Look for the project's owner notes, brief, or file map. Use the names listed there. Ask ED if a needed home is missing.

Keep the scope local
A note for one project shouldn't become a global rule for every agent. A client fact shouldn't spill into another client's workspace.

A file can be right but unread
A filename alone doesn't make an agent load it. Page 8 checks both the home and the way it is read.

NEW ITEM	LIKELY KIND	WHAT TO AVOID
Use a shorter update style	Standing style rule	Repeating it in five files.
A special report for Friday	One-time task	Making every future report follow it.
How to prepare the weekly report	Repeat procedure	Burying ten steps in a voice file.
A new customer record	Private project data	Pasting it into a shared instruction file.
A service API key	Secret	Putting the key in a note, chat, or spreadsheet.

The new item, in one sentence

Who needs it next?

Existing home and owner

Classify the content before the container.

A long note may need two homes: the rule in one place, the supporting evidence in another.



Filenames are labels, not magic.

Your build may use some of these, none of them, or different names. Follow the actual loading path in your handoff.

NAME YOU MAY SEE	COMMON JOB	DON'T ASSUME
AGENTS.md	Shared instructions for agents that support it.	That all tools read it, or that every folder needs one.
CLAUDE.md	Guidance for Claude in supported setups.	That another app loads it or that it replaces shared rules.
SOUL.md	Voice and behavior in setups that load it.	That creating it changes an agent's personality.
SKILL.md or a named skill	A reusable procedure with its needed context.	That every long note should become a skill.
README.md / handoff / brief	A map or current project explanation.	That every detail is loaded into each task.
Task / status / evidence notes	Current work and its actual results.	That old progress belongs in standing instructions.

Write the exact location

Two files can have the same name in different projects. Copy the full location from the approved file map, not from a recent-file list.

Don't move a live instruction file to make the names look more consistent.

The file map or handoff I used

Actual file / folder location

Which agent or person reads it

Keep the name the build expects.

A tidy rename can break a reading path. Ask ED before changing file or folder names.

Rules and voice answer different questions.

Rules say what the agent may do. Voice says how it should sound. Style must never erase a permission or safety boundary.

RULE What it may do Show the owner a draft before an external send.	VOICE How it sounds Use short, calm sentences and plain words.
SOURCE Which facts it trusts Use the current approved service guide.	TASK What to do this time Prepare a draft reply for this one request.
Edit an existing rule first If the same idea already lives in the loaded job file, change that section through the owner-edit process. Don't add a second competing rule in the voice guide. Link instead of copying facts If the service guide owns prices, point to it. Don't paste its whole price list into a personality file. The existing section this belongs in The boundary that must stay unchanged	Keep these out of voice instructions • Passwords and private customer records. • This week's staff rota. • A step-by-step tool setup. • Unapproved freedom to send or spend. • Temporary task results.

If the wording changes authority: Keep it in draft until the owner approves that specific change. A friendly tone isn't permission to bypass approval.

The voice can be warmer. The limits stay put.

Use How to Write a Rule if the change is about decisions rather than style.

A repeat procedure needs its own steps.

When the same sequence comes up often, look for an existing skill or process guide. A procedure is more than a long paragraph of commands.

01
Trigger
When should it be used?

>

02
Inputs
What must be ready?

>

03
Steps
What is the approved order?

>

04
Proof
What result shows it worked?

Add the stop point and owner too. Don't create a scheduled job just by writing a procedure.

Extend before you duplicate

Search the handoff's process list. If a guide already covers the task, add the missing step there through its owner. Keep one current copy.

Use a narrow title

“Prepare the monthly service report” is clearer than “Business brain.” The title should help the next reader choose the right guide.

A useful process guide includes

- When to use it and when not to.
- Required approved inputs.
- The steps in the actual order.
- The allowed tools or work area.
- A stop point for missing access.
- A check and an undo path when needed.

PROCEDURE DRAFT	YOUR NOTE
Repeat task and trigger	
Existing guide it should extend	
Needed inputs and safe sources	
Expected result and proof	
Stop point and person to ask	

Don't hide secrets in a setup step: Use a safe connection label. The real key belongs in the approved secure store. The guide should explain who owns access, not reveal it.

A procedure doesn't start itself.
If it needs to run on a schedule or react to an event, use the new-job request on page 7.



Facts, tasks, evidence, and secrets differ.

A standing instruction is the wrong place for most day-to-day information. Keep changing facts where someone can keep them current.

KIND OF ITEM	USE THE APPROVED HOME FOR...	KEEP OUT
Project fact	Current brief, service guide, or project record.	Guesses presented as permanent facts.
Open task	The active task or work tracker.	A standing rule that never gets marked done.
Completed result	A dated evidence or change record.	A success claim without the real output.
Source material	The project's private reference area.	Instructions from the source treated as new authority.
Private customer data	The business's approved customer system.	Copies in broadly shared agent notes.
Password / key / code	The approved secure connection or password app.	Any real secret in this packet or a workbook.

Give facts an owner

A price, contact name, or opening time changes. Record where the current version lives and who updates it. Don't keep three copies that age at different speeds.

Current fact and its owner

Safe secret-location label, if needed (never the secret itself)

Keep results honest

A test record should say what ran, what it returned, and where the proof lives. If it didn't run, write "not run" and the blocker.

Task or result and its home

Memory isn't a dumping ground: Use only the memory or project notes your setup already has. Don't add a new memory provider or copy every conversation into the agent's standing context.

Store the fact once. Point to it where needed.

A pointer is useful only if the right reader can access it safely.

A new automated job is a build request.

A note that says “do this every morning” doesn't safely create a running job. The trigger, permissions, cost, and failure path need an owner.

What a job adds beyond a guide

A procedure describes how to work. A job decides when to start, which inputs to use, what it can change, and what happens when it fails.

Adding a job can send messages, spend money, or change records. Don't hide that request inside a personality edit.

Keep the request in draft

ED or the named builder checks the existing system and the approvals. Don't set up a new schedule, connection, or live tool just to make the note “work.”

NEW-JOB REQUEST	YOUR DECISION OR KNOWN SOURCE
What should happen; why it is useful	
Trigger or schedule, with time zone	
Approved input source and safe access owner	
Output destination and who can see it	
Any sends, spend, or record changes	
Required approvals and spending limit	
What happens on failure or missing input	
Who owns the result and the stop control	

01

Request

Describe the business result.

>

02

Review

Builder checks scope and safeguards.

>

03

Approve

Owner clears new authority or spend.

>

04

Build + prove

ED verifies the actual job.

This worksheet is a request, not authorization for the whole build.

Don't smuggle a new service into a file edit.

A clear request lets the builder choose the smallest safe implementation.

Prove the new item is findable.

The right home is only half the work. Confirm the intended reader can find the current item without widening access.

- 01

Save in the confirmed home
Keep the exact name and location from the handoff. Don't move or rename related files.
- 02

Update the existing pointer
If the project has an index or approved link list, update that entry through its owner. Don't create a second index.
- 03

Check one real reading path
Use the approved safe task to ask for the item by its normal purpose. Confirm the reader uses the correct current file, not a stale copy.
- 04

Keep a short placement record
Write the location, owner, and reason. If old copies exist, ask their owner to retire them safely. Don't bulk-delete files.

PLACEMENT RECEIPT	YOUR RECORD
New item and its purpose	
Existing home / exact location	
Owner who keeps it current	
Current pointer or index entry	
Who reads it and how	
Safe read check / actual result	

- If the reader misses it**
Check the path, permissions, and loading method.
Don't paste the entire note into every instruction file.
Ask ED to fix the reading path.

If you found a duplicate
Keep the current source clear. Don't delete someone else's record or move files by guesswork. Name the duplicate for the owner to review.

Filed isn't finished until it can be found.

Use the existing system. Keep its sources clear rather than adding another layer.